WebIntelligence User's Guide

Version 2.7

WEBINTELLIGENCE ®

Version 2.7

User's Guide

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Contents

List of Examples

Finding the Information You Need

In this chapter

It's in the Documentation

Business Objects documentation continues to deliver timely and in-depth coverage of product information. Not just facts about product features, but a world of knowledge in the way of tips, samples, and troubleshooting instructions.

For your convenience, Business Objects documentation comes in a variety of formats including Windows online help, HTML, Acrobat PDF, paper, and multimedia. What's more, you can gain quick access to it at any time directly from the product you are working with.

Documentation has been carefully designed to meet your needs for speed and ease of navigation. All the information you need is there just a few mouse clicks away.

The next sections highlight the key features of our documentation.

A Documentation Service on the Web

From the Help menu of all our products, you can check out More Tips and Samples, the Business Objects documentation service on the Internet. From here, you can discover the latest updates, tips, samples, and troubleshooting.

You can also get there by pointing your browser to the following URL:

http://www.businessobjects.com/services/infocenter

From the Tips and Tricks page, registered customer support contacts can explore the electronic version of the Business Objects documentation set. It offers extensive information on all Business Objects products, updates, troubleshooting, tips, and much more.

In addition, registered DEVELOPER SUITE customers can download new documentation and code samples.

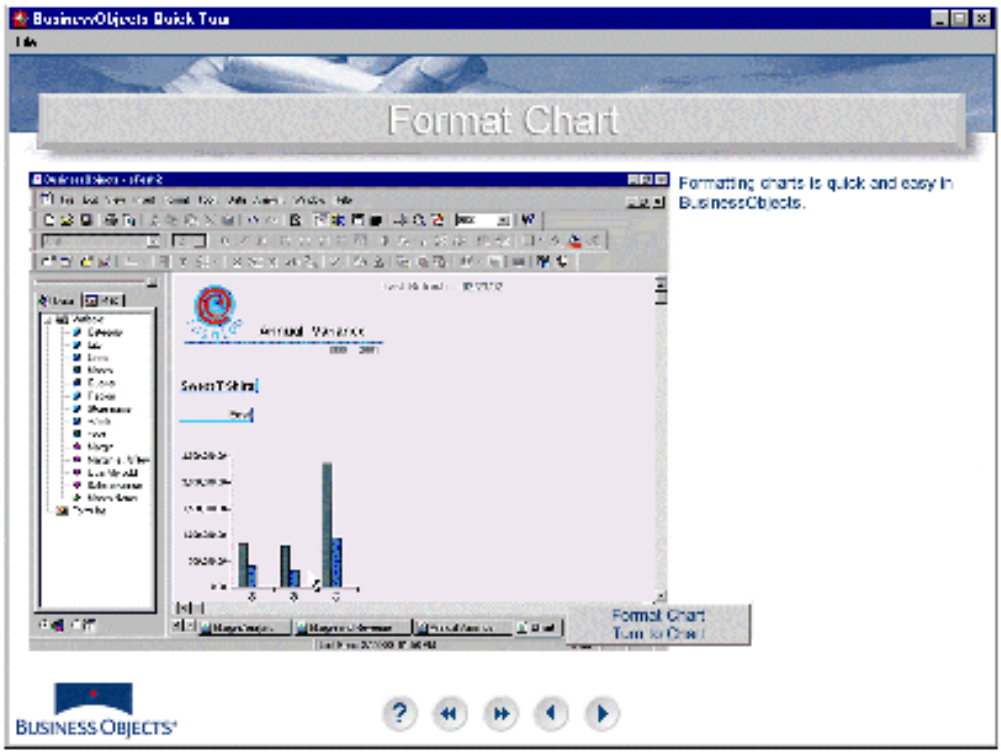
Multimedia

Business Objects multimedia comprises the BUSINESSOBJECTS Quick Tour, the INFOVIEW Quick Tour, and the BUSINESSMINER tutorial, all of which cover the essential features of these products.

The BusinessObjects Quick Tour

The BUSINESSOBJECTS Quick Tour is a multimedia presentation that takes you on a guided tour of the key features of BUSINESSOBJECTS. Its didactic approach makes it an ideal primer for first-time users of the product.

You may wish to use it as an accompaniment to the guide *Getting Started with BusinessObjects*.

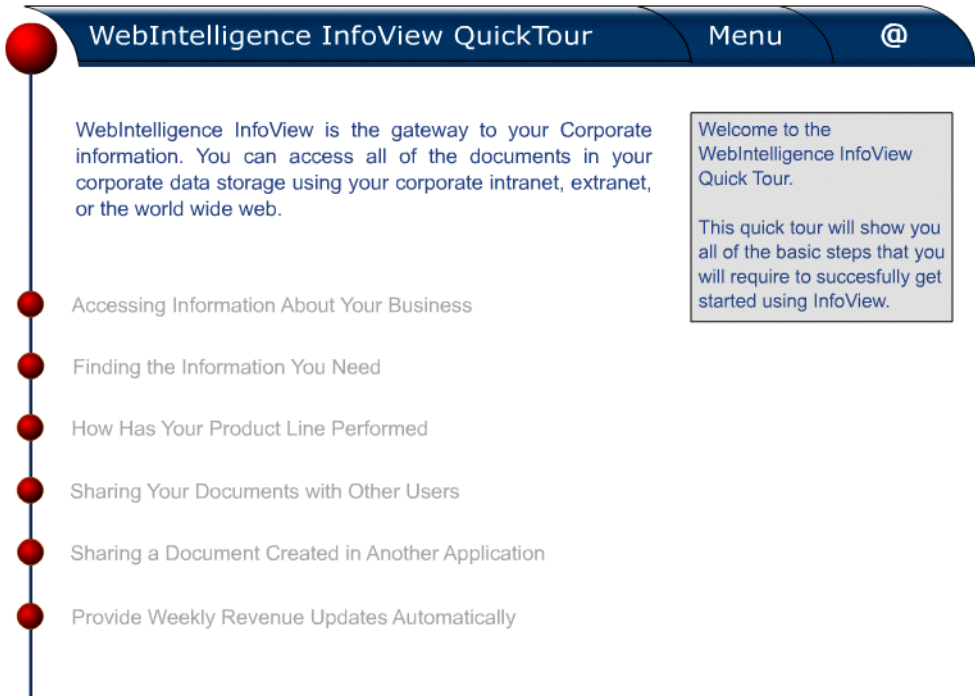


An actual screen from the BusinessObjects Quick Tour

The InfoView Quick Tour

The INFOVIEW Quick Tour is a multimedia presentation that highlights the key features of INFOVIEW. Intended primarily for new users, it offers an overview of all the features necessary for managing and distributing documents.

The INFOVIEW Quick Tour can be used as an accompaniment to the guide *Getting Started with WebIntelligence*.



An actual screen from the InfoView Quick Tour

The BusinessMiner Tutorial

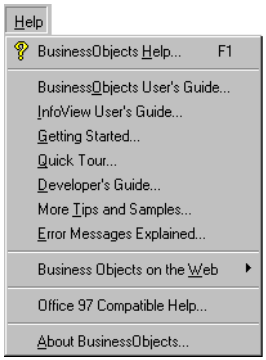
This multimedia tutorial teaches novice users how to use the powerful desktop datamining software, BUSINESSMINER. Each lesson in this tutorial has a narrated, animated presentation which shows users how to answer a business question using BUSINESSMINER. Users can then try out the demonstrated tasks themselves by following the step-by-step exercises in the accompanying guide.

Online Guides

User's Guides

All user's guides are available as Acrobat Portable Document Format (PDF) files. Designed for online reading, PDF files enable you to view, navigate through, or print any of their contents. The full list of Business Objects guides is provided in the *Deployment Guide*.

From a Business Objects product, you can open a guide from the commands of the Help menu.



The Help menu of BusinessObjects provides commands for viewing documentation.

During installation, the BUSINESSOBJECTS installer program automatically copies these files to:

Business Objects\BusinessObjects 5.0\Online Guides\En

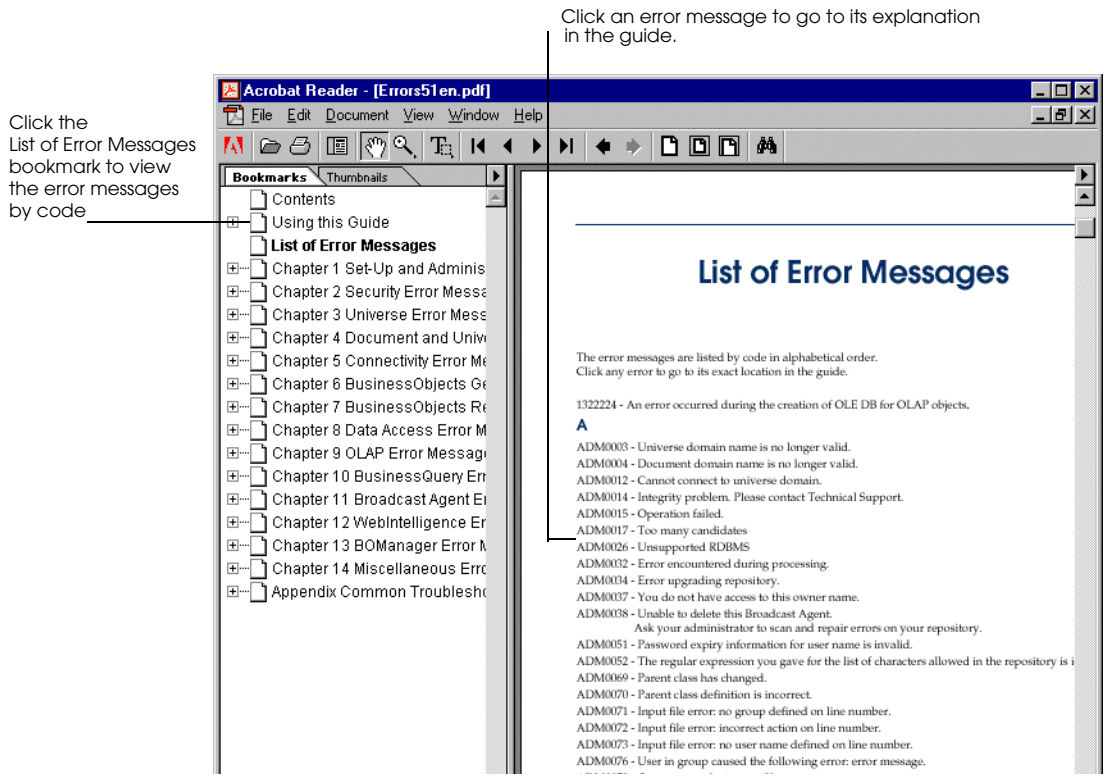
You can open a document from the Help menu provided that you have installed the Adobe Acrobat Reader, version 3.0 or higher on your machine. This Reader is available on the Business Objects CD-ROM. You can also download it for free from the Web site of Adobe Corporation.

The Error Message Guide

The *Error Message Guide* is a compilation of the error messages that can appear with ordinary use of Business Objects products.

This guide provides you with detailed troubleshooting information so that you can determine the reasons for an error and take the appropriate steps to resolve it. It allows you to search for error messages by code. Each error message appears with its probable cause and the recommended course of action.

You can open this online guide from any of the Business Objects products by selecting the Error Messages Explained command from the Help menu. From IINFOVIEW, click Error Messages in the navigation bar.



The Error Message Guide in PDF format.

Online Help

For Business Objects Windows desktop products, online help is available in the form of .hlp and .cnt files that comply with the standards of Microsoft Windows online help.

From INFOVIEW, online help is available for both INFOVIEW and WEBINTELLIGENCE.

What to Do for More Information

If you cannot find the information you are looking for, then we encourage you to let us know as soon as you can. We welcome any requests, tips, suggestions, or comments you may have regarding the contents of this or other Business Objects documentation. You can contact us by e-mail at:

documentation@businessobjects.com

To find out information about Business Objects products and services, visit our Web site at:

http://www.businessobjects.com

About this Guide

This guide describes the various concepts, tasks, and procedures required to use WEBINTELLIGENCE. This includes an overview of how the system operates, and procedures for using the tools and the system.

Audience

This guide is intended for the end users of the WEBINTELLIGENCE system.

Conventions Used in this Guide

The conventions used in this guide are described in the table below.

Convention	How Used
SMALL CAPITALS	The names of all products such as BUSINESSOBJECTS, WEBINTELLIGENCE, SUPERVISOR, DESIGNER.
This font	The names of BUSINESSOBJECTS classes, objects and conditions. For example, Customer, Sales, Revenue, Service, etc.
`This font`	Code, SQL syntax, computer programs. For example: `@Select(Country\Country Id)`
(...)	Placed at the end of a line of code, the symbol (...) indicates that the next line should be entered continuously with no carriage return.

Universal Accessibility Options

The Universal Access Java applet, available to some users of WEBINTELLIGENCE, offers keyboard alternatives to those who do not or can not use a mouse. Information on the Universal Access Java applet is available in Appendix A, Universal Access Java Applet Keyboard Options, on page 227.

Chapter 1 Introduction to WebIntelligence

In this chapter

What is WebIntelligence?

With WEBINTELLIGENCE, you can access the data in your corporate databases or data warehouses from within your office, your home, or around the world, using your corporate intranet, extranet, or the Internet.

WEBINTELLIGENCE makes it easy to access data, because you work with it in business terms that are familiar to you so you don't need any knowledge of the database structure or technology.

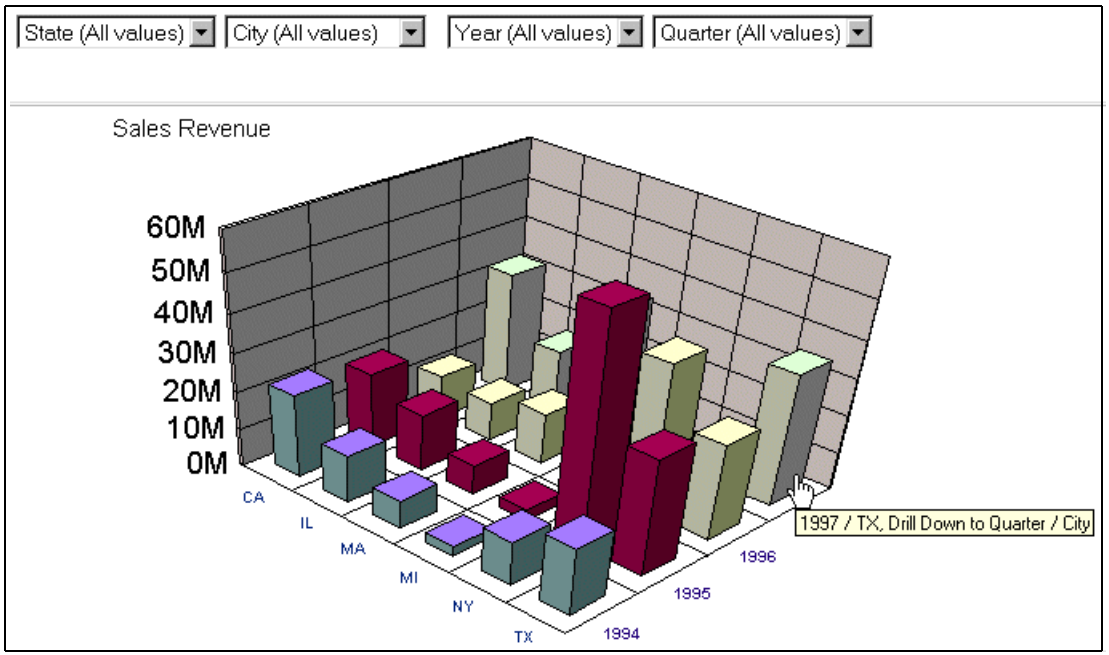
No WEBINTELLIGENCE software needs to be loaded on your computer. All you need to use WEBINTELLIGENCE is an Internet browser.

Once you've used WEBINTELLIGENCE to query a database, you can take the information and turn it into documents as simple as tables...

1999

Store name	Sales revenue
e-Fashion Austin Magnolia	561,123.40
e-Fashion Boston West	238,818.70
e-Fashion Chicago 33rd	737,914.20
e-Fashion Colorado Springs Sundance	448,301.50
e-Fashion Dallas ocean	427,244.70
e-Fashion Houston 5th	529,078.50
e-Fashion Houston ocean	682,230.80
e-Fashion Los Angeles 5th	982,637.10
e-Fashion Miami Sundance	405,985.10
e-Fashion New York Magnolia	1,023,060.70
e-Fashion New York Sundance	644,635.10
e-Fashion San Francisco ocean	721,573.70
e-Fashion Washington Sundance	693,210.50

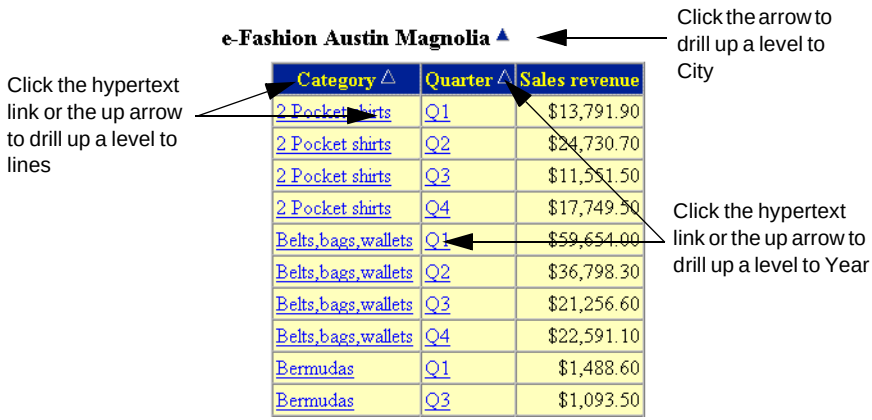
...or as complex as dynamic documents with drillable charts.



You can then save those documents for your own personal use, send them to other users, or publish them to the corporate repository for potentially even broader circulation.

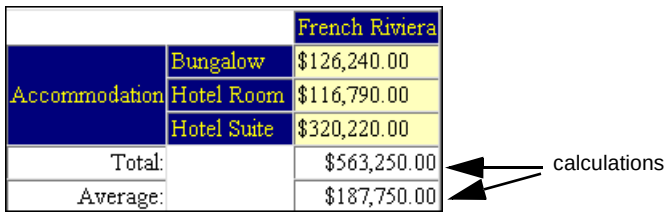
WEBINTELLIGENCE allows you to analyze and present data in a variety of ways:

- If you have WEBINTELLIGENCE, you may be able to create and distribute documents that are "drillable." This means that other users can simply click on values in the document to see more detail as *they* feel they need it, without having to run the query all over again.



Category	Quarter	Sales revenue
2 Pocket shirts	Q1	$13,791.90
2 Pocket shirts	Q2	$24,730.70
2 Pocket shirts	Q3	$11,551.50
2 Pocket shirts	Q4	$17,749.50
Belts,bags,wallets	Q1	$59,654.00
Belts,bags,wallets	Q2	$36,798.30
Belts,bags,wallets	Q3	$21,256.60
Belts,bags,wallets	Q4	$22,591.10
Bermudas	Q1	$1,488.60
Bermudas	Q3	$1,093.50

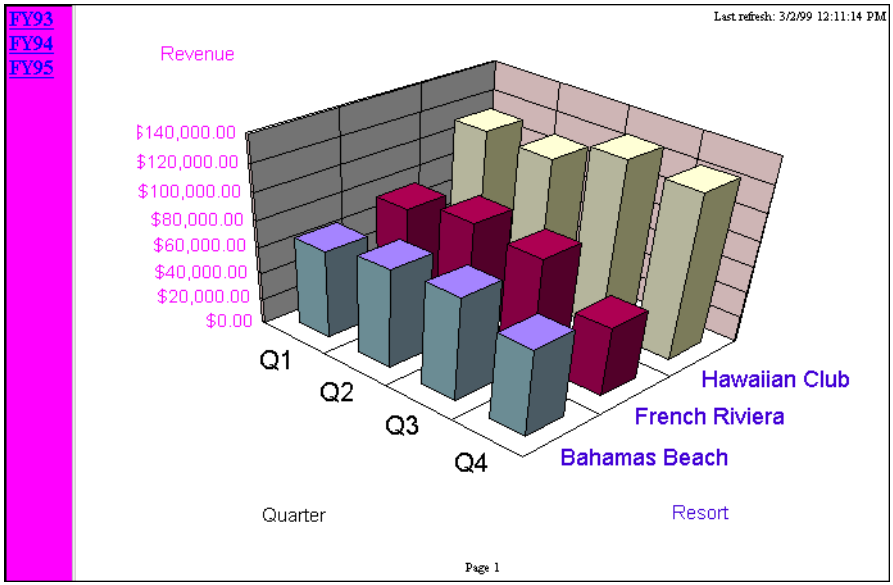
- You can set up a document to include basic calculations on data that are automatically updated with the latest information from the database.



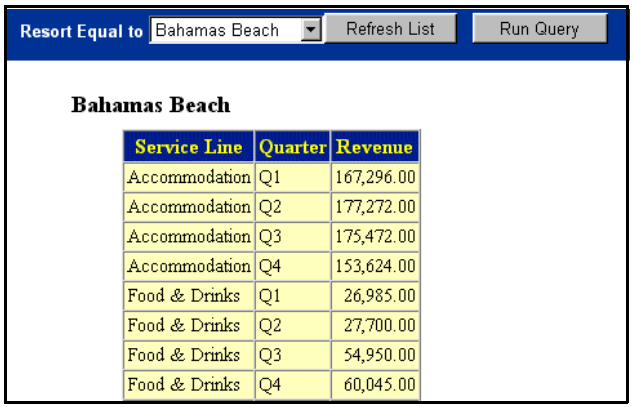
		French Riviera
Accommodation	Bungalow	$126,240.00
	Hotel Room	$116,790.00
	Hotel Suite	$320,220.00
Total:		$563,250.00
Average:		$187,750.00

- Because you're using a Web browser, you can include hyperlinked images and sound or video objects. For example, simply by clicking the name of a model in an imported car catalog, a user can see a video showing a 360° view of the car, as well as its interior features.

- You can also create hyperlinked indexes to navigate quickly between sections in a document.

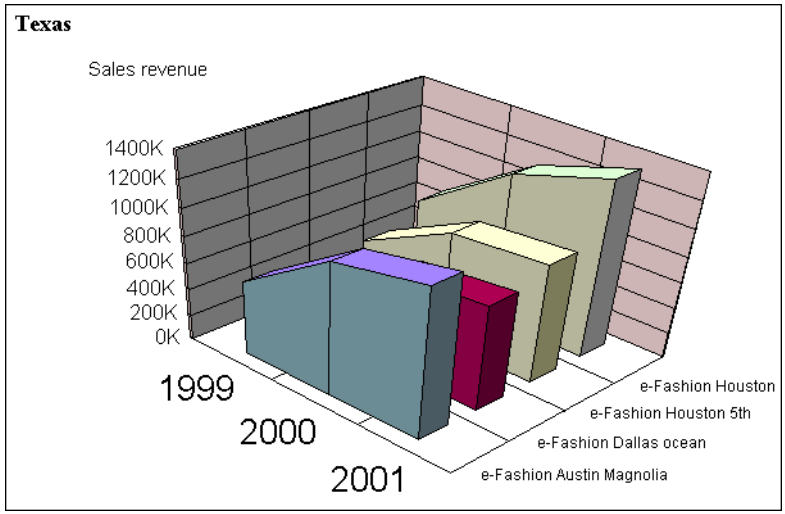


- You can include condition prompts in documents that let you obtain just the information you need, and filter out the rest.

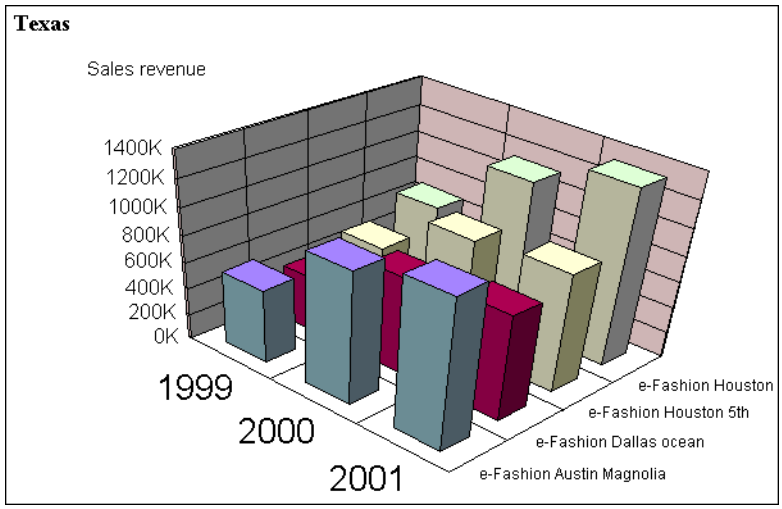


Service Line	Quarter	Revenue
Accommodation	Q1	167,296.00
Accommodation	Q2	177,272.00
Accommodation	Q3	175,472.00
Accommodation	Q4	153,624.00
Food & Drinks	Q1	26,985.00
Food & Drinks	Q2	27,700.00
Food & Drinks	Q3	54,950.00
Food & Drinks	Q4	60,045.00

- You can choose from a wide variety of chart formats to represent the data.



If you think another graphical format would make the data clearer, you can change the format in a couple of mouse clicks.



What Can You Do with WebIntelligence?

As a user of WEBINTELLIGENCE, you access and view WEBINTELLIGENCE documents via the e-business intelligence portal INFOVIEW. You can customize INFOVIEW to display the information according to your personal business needs.

You then use WEBINTELLIGENCE to perform analysis and to edit the WEBINTELLIGENCE documents you access and to create new WEBINTELLIGENCE documents. The analysis you can perform with WEBINTELLIGENCE depends on the user rights given to you by your BUSINESSOBJECTS supervisor.

What User Rights Do You Have?

Your user rights are granted by your BUSINESSOBJECTS supervisor. The supervisor defines:

- The parts of the WEBINTELLIGENCE interface you can access.

  Regardless of your license, your supervisor can restrict the availability of fundamental WEBINTELLIGENCE functionality, such as access to particular document lists, access to the Web Panel, etc.
- Your database connections
- The universes you can access for creating and editing queries

The rights accorded to each user define the user's *profile*. It is precisely this profile-based security system that allows a single document to be distributed to many users -- with end users having access only to the information that they are authorized to see.

What is the Difference Between InfoView and WebIntelligence?

INFOVIEW gives you an instant overview of all the documents available to you in the corporate database, and allows you to view, refresh and share them. You must have INFOVIEW to use WEBINTELLIGENCE.
See "Accessing and Sharing Documents with InfoView" on page 24.

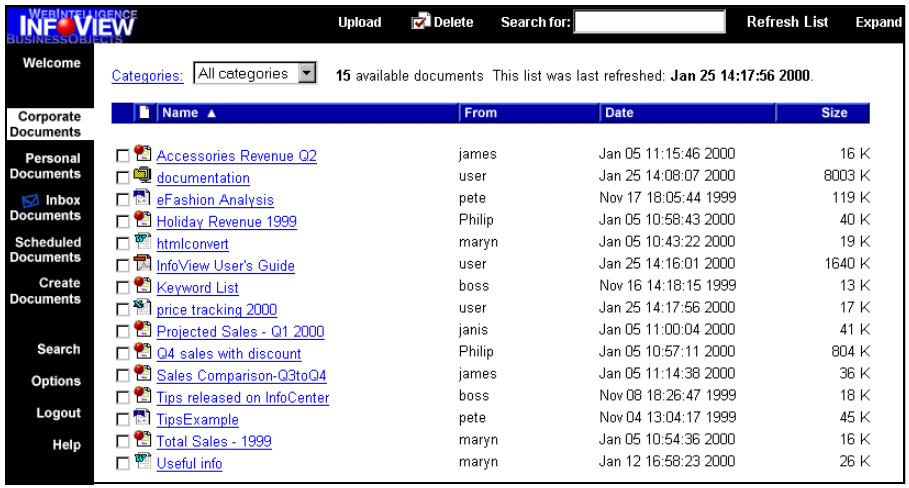
As a WEBINTELLIGENCE user, you may have any or all of the following functionalities available to you:

- Create new WEBINTELLIGENCE documents and edit existing ones. See "Creating Documents with WebIntelligence" on page 25.
- Drill to more detailed levels of data in drillable WEBINTELLIGENCE documents. See "Drilling Through Data" on page 28.

Accessing and Sharing Documents with InfoView

INFOVIEW is your main administrative interface when using WEBINTELLIGENCE.

INFOVIEW displays several document lists that provide you with an instant overview of all the documents available to you.



INFOVIEW includes up to three document lists:

- The Corporate Documents page is a catalog of all the documents that you are allowed to access in the corporate repository. As long as you have the right to view a single corporate document, INFOVIEW contains this list.
- The Personal Documents page lists the documents you've saved for your own personal use.
- The Inbox Documents page shows you the documents that other users have sent you.

These lists not only keep you up on all the documents that impact your work, but provide you with the means to view, distribute, and make personal copies of them. INFOVIEW allows you to use a filtering mechanism called *categories* to turn unwieldy document lists into more manageable document subsets.

For more information about using INFOVIEW, see the printed *InfoView User's Guide*, or the INFOVIEW On-line User's Help.

Creating Documents with WebIntelligence

With WEBINTELLIGENCE, you can create your own WEBINTELLIGENCE documents, or modify existing WEBINTELLIGENCE documents.

The two basic mechanisms upon which WEBINTELLIGENCE relies for generating documents are:

- The universes used to build queries
- The queries used to retrieve information from data storage

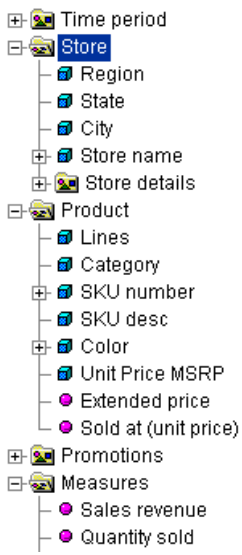
Universes

Universes provide the business-intelligent semantic layer that isolates you from the technical issues of the database. A universe maps everyday business terms that describe your business environment to the data in the database.

Universes are made up of *classes* and *objects*.

- Objects are elements that map to a set of data from a relational database in terms that pertain to your business situation. These objects allow you to retrieve data for your documents.

  For example, the objects in a universe for a chain of outlets might include Region, State, and Store name.



- Classes are logical groupings of objects.

  For example, the objects listed above might belong to a class called Store.

In your company or organization, universes are created by a universe designer, using DESIGNER. The designer then makes universes available to you and other users, so that you can access the data you want from the database through an intuitive, user-friendly interface.

Dimension objects, measure objects, and detail objects

When creating universes, universe designers define and qualify objects. The qualification of an object determines how it can be used in analysis in documents.

An object can be qualified as a dimension, a detail, or a measure. Each type of object serves a different purpose:

- Dimension objects retrieve the data that will provide the basis for analysis in a document. Dimension objects typically retrieve character-type data (customer names, resort names, etc.), or dates (years, quarters, invoice dates, etc.)

- A detail object is always associated with one dimension object, for which it provides additional information. For example, Address is a detail object that is associated with Customer. Address provides additional information about customers, such as their addresses.

- Measure objects retrieve numeric data that is the result of calculations on data in the database.

  Measure objects are semantically dynamic: the values they return depend on the objects with which they're used. For example, if you include Resort and Revenue in a query, revenue per resort is calculated. If you include Customer and Revenue, revenue per customer is calculated.
  This is called the object's *context*.

Queries

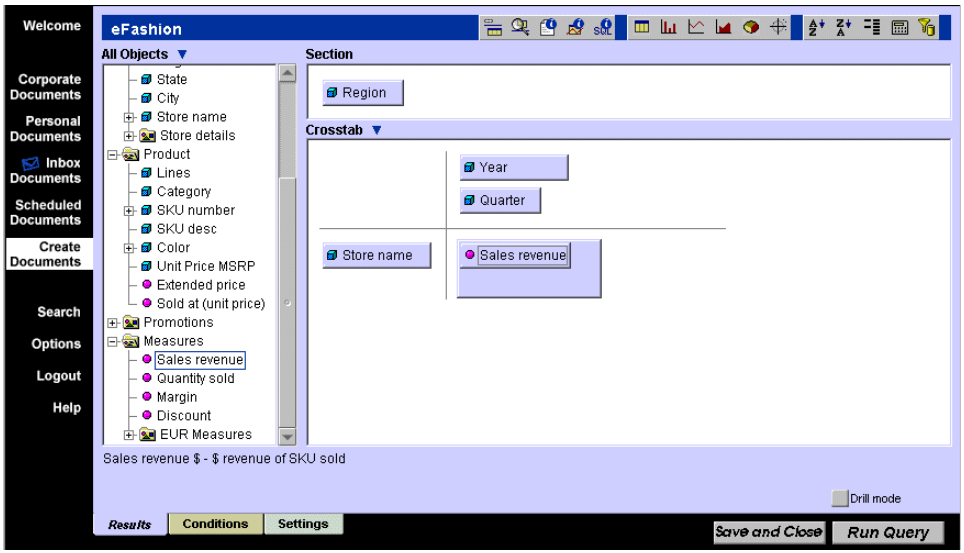
Queries allow you to actually retrieve the data that you want to include in a document.

You build a query in a document editor called the Web Panel, by adding and organizing objects from a universe. When you run the query, WEBINTELLIGENCE connects to the database, retrieves the data mapped to the objects you selected, then generates the HTML document you designed with the data in it. It then displays this document in the Document Results page in your browser.

The Web Panel

The Web Panel is a Java applet or ActiveX control that runs in your browser. It provides the query interface you use to build and edit WEBINTELLIGENCE documents. You can determine which form of the Web Panel you want to use in the Options page. See "Selecting Your Document Editor" on page 41.

The Web Panel is similar in appearance to the BUSINESSOBJECTS document editor It also includes elements of the BUSINESSOBJECTS Query Panel, and the Slice and Dice Panel.



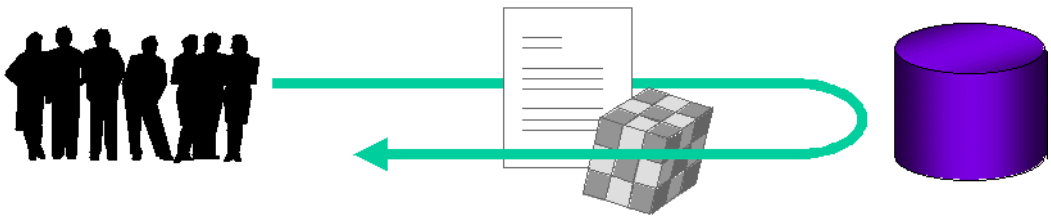
The Web Panel contains three tabs:

- The Results tab allows you to add objects to the query, order their appearance, add breaks, sorts and conditions, and specify the document type (e.g. crosstab or scatter chart).
- The Conditions tab allows you to set up data rules and conditions to search for only certain types of data or return values. For example, you can specify revenue for a particular year or country. See "Defining Conditions and Filters" on page 129.
- The Settings tab allows you to format your document by entering a document title, changing the font, cell widths, colors and borders, and by determining how data is displayed, for example, by including prompts. See "Using the Settings Tab" on page 164.

Drilling Through Data

WEBINTELLIGENCE allows you to perform "drill down" analysis on existing drillable documents, using the multidimensional cache stored on the WEBINTELLIGENCE server. If you need more information than is visible in a document, you can drill transparently through the document and into the database itself.

To broaden your reach beyond corporate databases and onto the entire Web, WEBINTELLIGENCE includes "hyperdrill," which allows document cell or chart contents themselves to be hyperlinks that can "drill out" of a document and into any Internet-based data source.



Using hyperdrill, for example, an accounts receivable document can include a hyperlink for each customer. When clicked, each link activates a credit service to produce a current credit report for that customer.

What WebIntelligence Shares with BusinessObjects

WEBINTELLIGENCE uses the BUSINESSOBJECTS semantic layer and query technology to provide a business representation of data, working alongside the full client version of BUSINESSOBJECTS. This guarantees a high level of interoperability between the two products, such as:

- The sharing of user rights

  For example, you as a user have access to the same corporate storage areas whether you're using WEBINTELLIGENCE or BUSINESSOBJECTS.

- The sharing of documents

  You can use WEBINTELLIGENCE to view and refresh documents that have been created then sent to you using BUSINESSOBJECTS.
  You can also send the documents you create in WEBINTELLIGENCE to BUSINESSOBJECTS users, or publish those documents to the corporate repository for their use.

- The sharing of INFOVIEW, which provides you with the lists of documents that have already been generated in WEBINTELLIGENCE or BUSINESSOBJECTS, or documents that have been uploaded to the database. INFOVIEW is the common entry point for viewing, managing, and distributing documents.

Chapter 2 Getting Up and Running

In this chapter

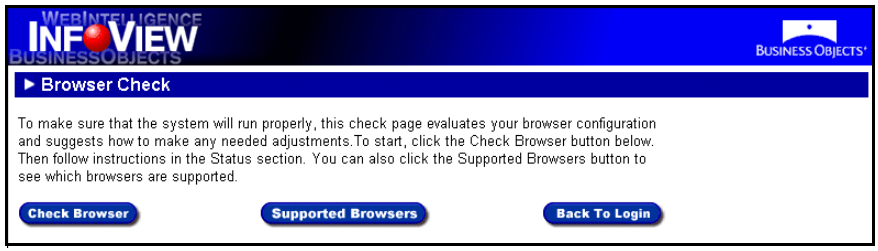
Checking Your Browser Configuration

For WEBINTELLIGENCE to run correctly, you need to make sure your browser configuration is adapted to WEBINTELLIGENCE use. For example, your browser needs to be cookie enabled to log in.

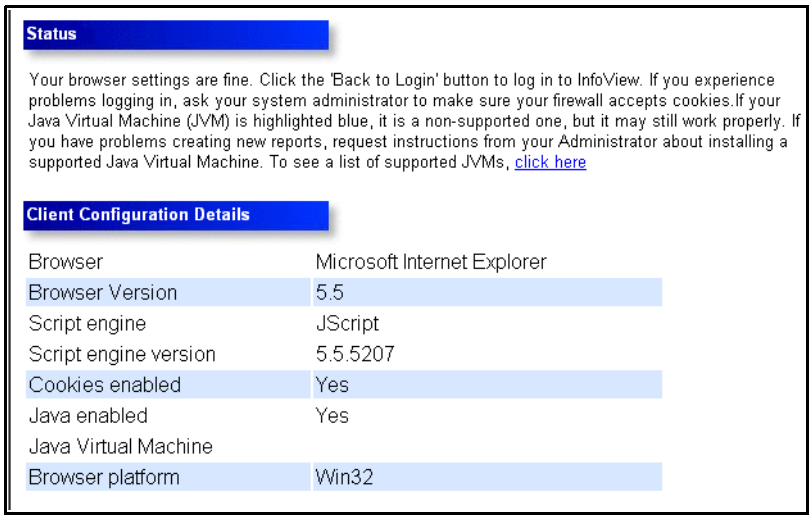
You should therefore run an automatic check for any potential configuration problems *before* you log into WEBINTELLIGENCE for the first time.

To check your browser:

1. In the WEBINTELLIGENCE login page, click the Check browser configuration link. The Browser Check page opens.



2. Click the Check Browser button to the left. After a few seconds, WEBINTELLIGENCE displays information about the browser you're currently using in the lower part of the page.



If you can't see all this information, use the scrollbar to scroll downward.

In this page's fields, fatal problems are displayed in bold and in red. Warnings are highlighted in bright blue.

Note: If you want to create documents using Netscape your browser must be Java enabled. If you want to create documents using Microsoft Internet Explorer, your browser must be Java or ActiveX enabled.

3. For a suggested solution to any problem or warning, simply click it.
4. For a list of supported browsers, client operating systems, languages, and Java Virtual Machines, click Supported Browsers.
5. To close the page and return to the WEBINTELLIGENCE login page, click the Back to Login button.

Logging Into WebIntelligence

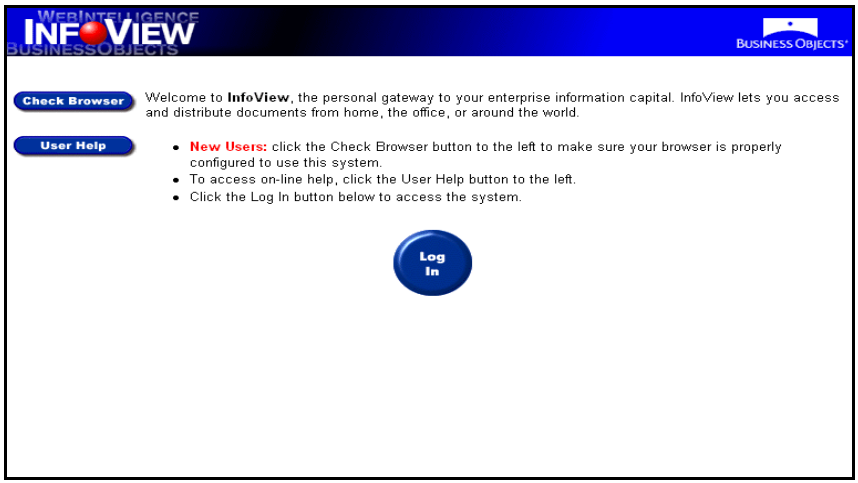
To log into the WEBINTELLIGENCE system, you need the following from your WEBINTELLIGENCE system administrator:

- Your user name and password
  If you're a BUSINESSOBJECTS user, you can use your BUSINESSOBJECTS user ID and password to enter INFOVIEW.
- The URL or a bookmark which allows you to access WEBINTELLIGENCE.

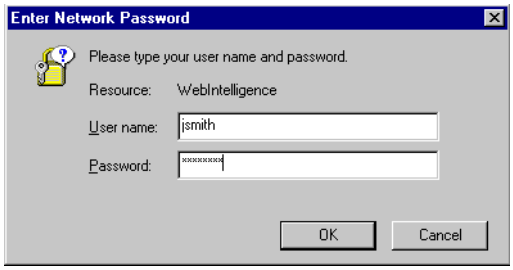
Note: Depending on how your WEBINTELLIGENCE system administrator has set up your account, the pages giving you access to WEBINTELLIGENCE may not resemble the pages displayed below. You may not even be prompted for a username and password.
If you need help launching WEBINTELLIGENCE, contact your administrator.

To log in:

1. Start your Internet browser.
2. Point your browser to WEBINTELLIGENCE using either the bookmark or the URL your WEBINTELLIGENCE system administrator has given you. The WEBINTELLIGENCE login page opens.



- Click the round Log In button. The login dialog appears.



3. Enter your user name and password in the entry boxes, then click OK.

   Your WEBINTELLIGENCE start page loads up and you can begin working in WEBINTELLIGENCE.

Your Start Page

Unless your system administrator has set another page as the default start page, the WEBINTELLIGENCE Welcome page is the first page that opens when you launch WEBINTELLIGENCE.

The Welcome page is your main interface for viewing, managing and distributing all of the documents in your corporate repository, including WEBINTELLIGENCE and BUSINESSOBJECTS documents. It contains short descriptions of WEBINTELLIGENCE and INFOVIEW features and provides links that let you access them immediately.

To get back to this page at any point, click Welcome in the navigation bar. You can define a different start page, or personalize your My InfoView page, simply by selecting it from the Start Page section in the Options page. (See "Customizing INFOVIEW – Setting Your Start Page" in Chapter 2 of the *InfoView User's Guide*.)

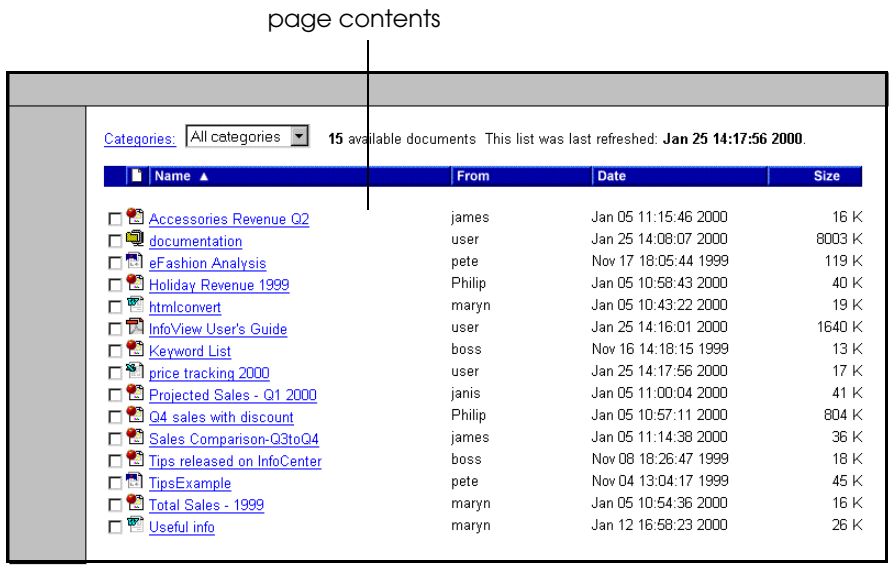
What WebIntelligence Pages Look Like

WEBINTELLIGENCE pages have three parts:

- The page contents
- The topbar
- The navigation bar

The Page Contents

The page contents occupy the largest frame in the browser window, and are the part which most visibly changes as you navigate from page to page.



Page contents are the body of the page, including INFOVIEW document lists, and the WEBINTELLIGENCE Available Universe page and Web Panel, as well as all the interfaces which permit you to view and edit documents.

You have two options for viewing document list in INFOVIEW.

- Compact - displays the document name, the name of the person who created the document, the document creation date, and document size.
- Expand - displays all of the information available in compact mode, plus links to the following options: load into spreadsheet, save, send to users, and edit. Expand mode also allows you to view the document description and document properties (i.e., name, description, categories, and key words).

The Topbar

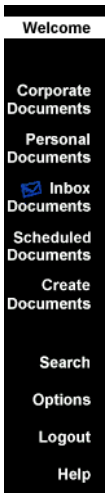
The topbar running across the top of the page changes according to the page's contents:

- If the page displays a list of documents or universes, the topbar provides links to upload documents from another source, search for documents or universes, to delete documents, refresh the list, and view the list in expanded mode.

- If the page displays an open document that you're viewing with INFOVIEW, the topbar contains links that let you act on the open document.

- On the Search, Options, and Logout pages the topbar changes to a graphical page header.

The Navigation Bar



The *navigation bar* on the left side of the WEBINTELLIGENCE page remains constant no matter what page you open. The links it contains are determined by your user's profile. You can insert a picture at the top of it if you want. For instructions, see "Setting a Picture" in Chapter 2 of the *InfoView User's Guide*.

Depending on the access rights you've been accorded by the supervisor, the navigation bar lets you access up to three different INFOVIEW document catalogs:

- The Corporate Documents page
- The Personal Documents page
- The Inbox Documents page

Note: For complete information about INFOVIEW functionality, please see the *InfoView User's Guide*.

If you have the necessary access rights in WEBINTELLIGENCE, you can click Create Documents in the navigation bar to open the Available Universes page. This page lets you select a universe and create a new document using the universe's data objects. If you have access to one universe only, you will see just this one universe listed.

If you've defined a default universe, the Create Documents link automatically opens the Web Panel with the universe loaded in it.

The navigation bar also gives you access to other WEBINTELLIGENCE and INFOVIEW pages:

- The Welcome page
- The Corporate Documents list
- Your Personal Documents list
- Your Scheduled Documents list
  This link is visible only if you have the right to schedule documents
- The Search page
- The Options page
- The Logout page
- The Help page

Customizing Your WebIntelligence Account

You can customize your WEBINTELLIGENCE account to display the information that you access most.

All of the options for customizing INFOVIEW and WEBINTELLIGENCE are on the various sections of the Options page. There are five sections, which allow you to choose how you view and manage documents with the INFOVIEW portal, and how you create and edit documents with WEBINTELLIGENCE and BUSINESSOBJECTS.

The sections that apply to how you create documents are:

- Universe

  Lets you:

  - Set whether the list of available universes is displayed in Compact or Expanded format
  - Specify a default universe, which is automatically loaded whenever you open the Web Panel

  - Specify when you want to refresh the list of available universes
- Password

  Lets you change your WEBINTELLIGENCE/INFOVIEW/BUSINESSOBJECTS password.
- Create and Edit Documents

  Lets you choose what type of documents you want to create, WEBINTELLIGENCE or BUSINESSOBJECTS, and what form of the Web Panel you use to create and edit WEBINTELLIGENCE documents.

The remaining sections of the options page apply to how you manage and view documents with the INFOVIEW portal:

- Start Page

  Lets you specify your INFOVIEW start page and insert a picture at the top of the navigation bar.
- Document Lists lets you:
  - Set whether document lists are displayed in Compact or Expanded format.
  - Specify a document category to be used as default filtering criterion.
  - Specify when to refresh the list (Corporate and Inbox Documents lists only).
- View Documents

  Lets you specify in which format you view BUSINESSOBJECTS documents.

Tip: For information about INFOVIEW options, see the *InfoView User's Guide*.

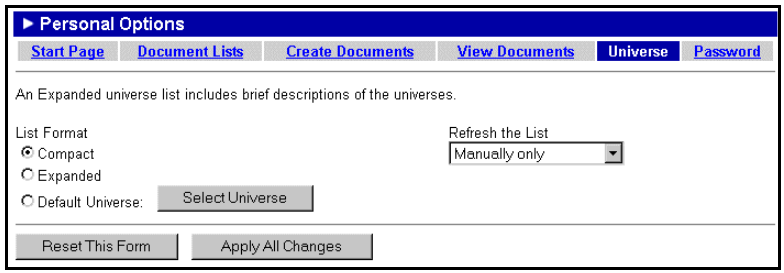
Setting Universe Options

You can set universe list display in the Available Universes page to Expanded or Compact form. The Expanded version of the list includes a brief description of the universe. You can also set when you want the list of available universes to be refreshed.

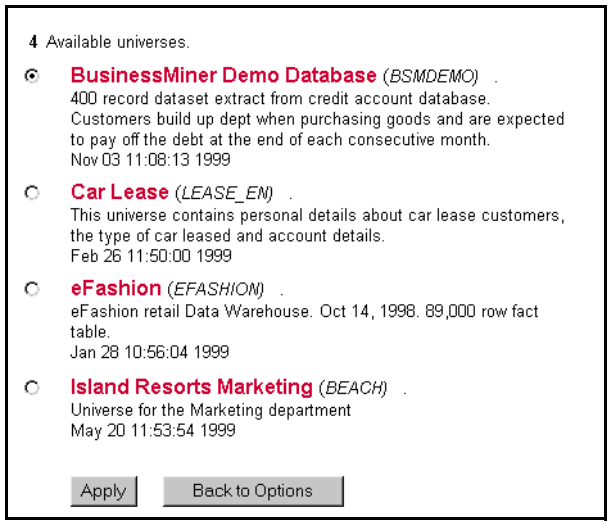
You can bypass the list of universes entirely by specifying a default universe. This is a great idea if you find you most often create documents using the same universe. Once you've defined a default universe, when you click Create Documents in the navigation bar, the Web Panel opens directly with the default universe's classes and objects loaded in it.

To set universe list display and/or define a default universe:

1. Click Options in the navigation bar to open the Options page.
2. Click Universe.



3. If you want a list of universes to open when you click Create Documents in the navigation bar, select whether you want to display that list in Compact or Expanded form.
   Now go to Step 5.
4. If you often use the same universe to create new reports, you can select it as your default universe, so that the Web Panel opens directly with this universe loaded in it. To set a default universe:
   - Select Default Universe.
   - Click the Select Universe button. The list of the universes available to you opens, in Expanded form to give you the most information possible.



   - Select the universe you want to use, then click the Apply button. Your choice is saved.
   - Click the Back to Options button.

You return to the Options page. The name of the universe you just selected now appears in the Default Universe field.
- Go to Step 6.

5. If you did not specify a default universe, indicate whether you want the universe list to be automatically updated once every user session, or manually only.

6. When you're done, click Apply All Changes.

Selecting Your Document Editor

You can specify what tool you want to use to create and edit documents. You can choose between four Web Panel options for creating WEBINTELLIGENCE documents.

- Full Java applet
- Light Java applet
- ActiveX control (for Microsoft Internet Explorer 5.0 and 4.0 browsers or higher)
- Optimized for my browser

Note: The Universal Access Java applet is available to some users of WEBINTELLIGENCE. Information on the Universal Access Java applet is available in Appendix A, Universal Access Java Applet Keyboard Options, on page 227.

If your user rights allow it, you may also have the option to create and edit documents in BUSINESSOBJECTS. If you are not sure whether you have the right to do so, contact your system administrator. For information about installing BUSINESSOBJECTS through the INFOVIEW portal, refer to the *InfoView User's Guide*. For instructions on creating and editing documents in BUSINESSOBJECTS, refer to the *BusinessObjects User's Guide*.

If you decide on a Java applet, the full applet is recommended. For a description of the differences between the Full and the Light versions, see page 53.

If you're running WEBINTELLIGENCE on a non-Windows client platform, you must choose a Java applet Web Panel. If you're using Microsoft Internet Explorer 4.0 or higher on a Windows platform, the following information will help you choose either the Java applet or the ActiveX control options:.

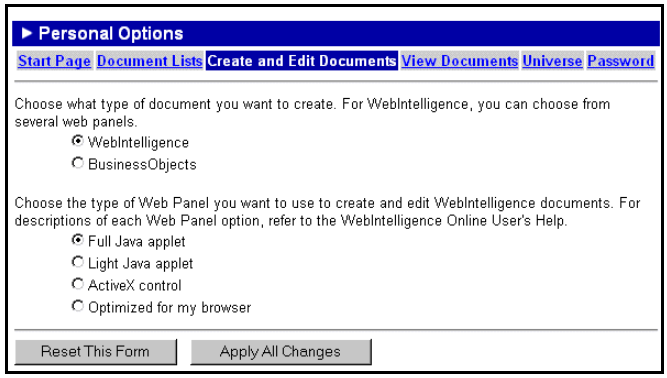
Reasons to choose the Java applet	Reasons to choose the ActiveX control
Java is much more secure than ActiveX technology, which is more integrated with local devices and resources, such as printers and other applications.	ActiveX technology provides better integration with other local applications or printing in a standardized Microsoft environment.
	The ActiveX Web Panel opens much more quickly than the Java applet.

If you select the Optimized for my browser option:

WEBINTELLIGENCE activates...	With the following browser on your machine...
ActiveX Web Panel	Microsoft Internet Explorer 5.0 or 4.0.1 SP2 or higher.
Full Java applet	All other supported browsers.

To select a document editor:

1. Click Options in the navigation bar. The Options page opens.
2. Click the Create and edit documents tab.



3. Select WEBINTELLIGENCE.
4. For WEBINTELLIGENCE Document Editor, select one of the four options, then click Apply All Changes.

The next time you open the Web Panel, WEBINTELLIGENCE will launch the version you selected.

Note: If you've never used this type of Web Panel, a dialog box will appear asking you if you want to download the Java applet or ActiveX control. See "Opening the Web Panel for the first time" on page 61.

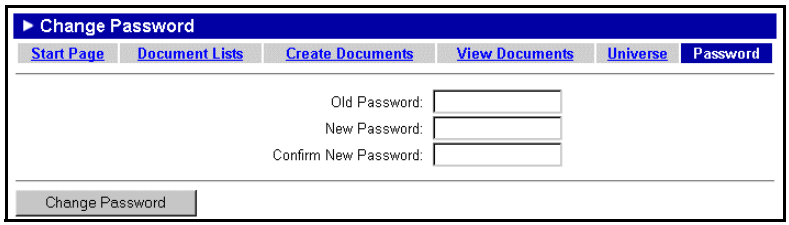
Changing Your Password

Your initial WEBINTELLIGENCE password is created by the BUSINESSOBJECTS supervisor who defined your user profile. Once you've logged in to the WEBINTELLIGENCE system for the first time, however, you can change your password to one of your choice.

When you change your password, it changes for BUSINESSOBJECTS as well.

To change your password:

1. Click Options in the navigation bar. The Options page opens.
2. Click the Password tab.



3. Do the following:
   - Type your current password in the Old Password box.
   - Type your new password in the New Password box. This is case-sensitive.
   - Confirm the new password by typing it again in the Confirm New Password box.
4. Click Change Password.

The next time you log in to WEBINTELLIGENCE, you will need to use the new password.

Getting Help

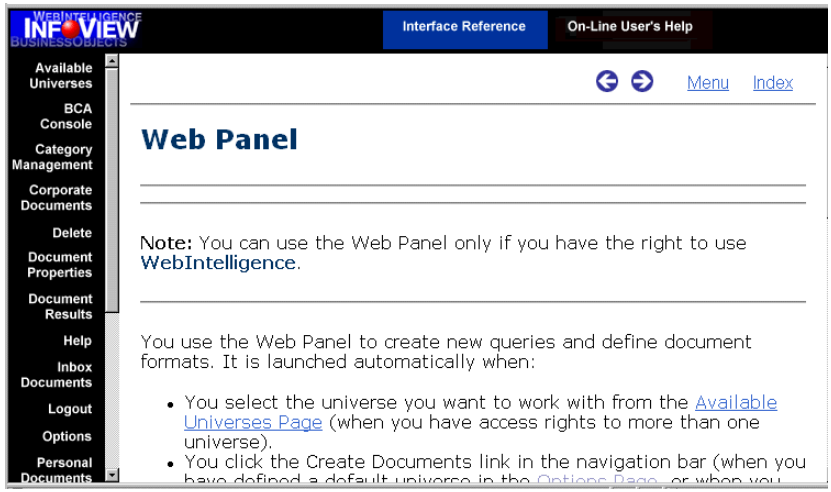
WEBINTELLIGENCE provides you with two kinds of on-line help:

- The Interface Reference
- The On-Line User's Help

The Interface Reference

The Interface Reference is your guide to every page and dialog box in the INFOVIEW/WEBINTELLIGENCE interface. As you use INFOVIEW and WEBINTELLIGENCE, you can obtain contextual help for whatever interface element you're currently using. Simply click Help in the navigation bar.

A new browser window opens, with a modified navigation bar and toolbar, and a description of the interface element you're using in the contents area of the page.



You'll also find hypertext links to relevant sections in the On-Line User Help.

From this page, you can:

- Jump to other topics in the Interface Reference by clicking links in the navigation bar
- Access the On-Line User's Help by clicking On-Line User's Help in the toolbar

To return to WEBINTELLIGENCE, either close the browser containing the Help window or click the browser window running WEBINTELLIGENCE.

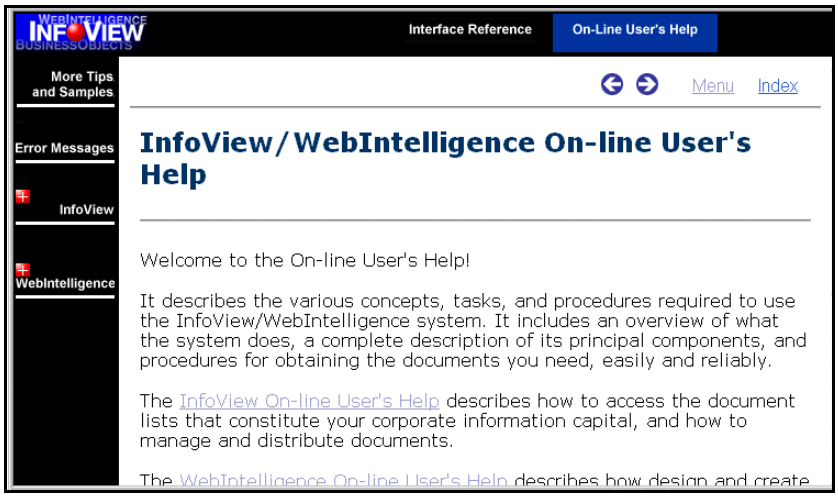
The On-Line User's Help

The On-line User's Help provides you with a detailed description of WEBINTELLIGENCE and INFOVIEW with step-by-step user instructions, as well as overall information about Business Objects on-line documentation. From this page you can also download PDF versions of additional Business Objects product documentation.

To access the On-line User's Help:

1. Do one of the following:
   - From the WEBINTELLIGENCE Login page, click the User Help button.
   - From the Welcome page, click Help in the navigation bar.
   - From the Interface Reference, click On-Line User's Help in the toolbar.

   The INFOVIEW/WEBINTELLIGENCE On-line User's Help page opens.



The navigation bar changes to display links to the help topics. You can access on-line help for WEBINTELLIGENCE and INFOVIEW, a PDF version of the Error Message Guide, and additional online Tips and Samples. You can access a particular topic by opening the WEBINTELLIGENCE and INFOVIEW folders in the navigation bar and clicking the help topic you want.

Tip: You can quickly expand or collapse the on-line help links in the navigation bar by clicking the underlined links WEBINTELLIGENCE and INFOVIEW.

To return to WEBINTELLIGENCE, either close the browser containing the Help window, or click the browser window running WEBINTELLIGENCE.

Logging Out of WebIntelligence

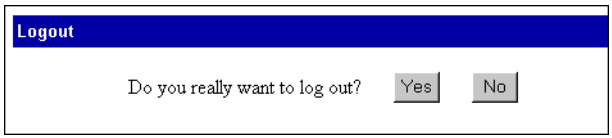
To finish using WEBINTELLIGENCE, you need to log out of the product instead of simply closing your browser. This enables WEBINTELLIGENCE system administrators to keep track of which users are logged into the system and active at any given time. They need this information to configure the system to handle transaction loads most efficiently.

Logging out is easy. If you're inactive longer than the maximum time period defined by your administrator, WEBINTELLIGENCE logs you out automatically. You can also actively log out at any time.

To log out of WEBINTELLIGENCE:

1. Click Logout in the navigation bar.

   The Logout page opens.



2. Click Yes.

If you decide you don't want to log out after all, do any of the following:

- Click No.
- Return to the previous HTML page you viewed by clicking the browser's Back or Previous button.
- Go to any other part of INFOVIEW or WEBINTELLIGENCE by clicking a link in the navigation bar.

Chapter 3 Creating and Editing WebIntelligence Documents

In this chapter

Web Panel Overview

The Web Panel is where you build, edit and view the document definitions you use to generate WEBINTELLIGENCE documents. These definitions include both the queries you use to retrieve data for your document, and the document's formatting.

The Web Panel comes in three versions:

- Full Java applet
- Light Java applet
- ActiveX control

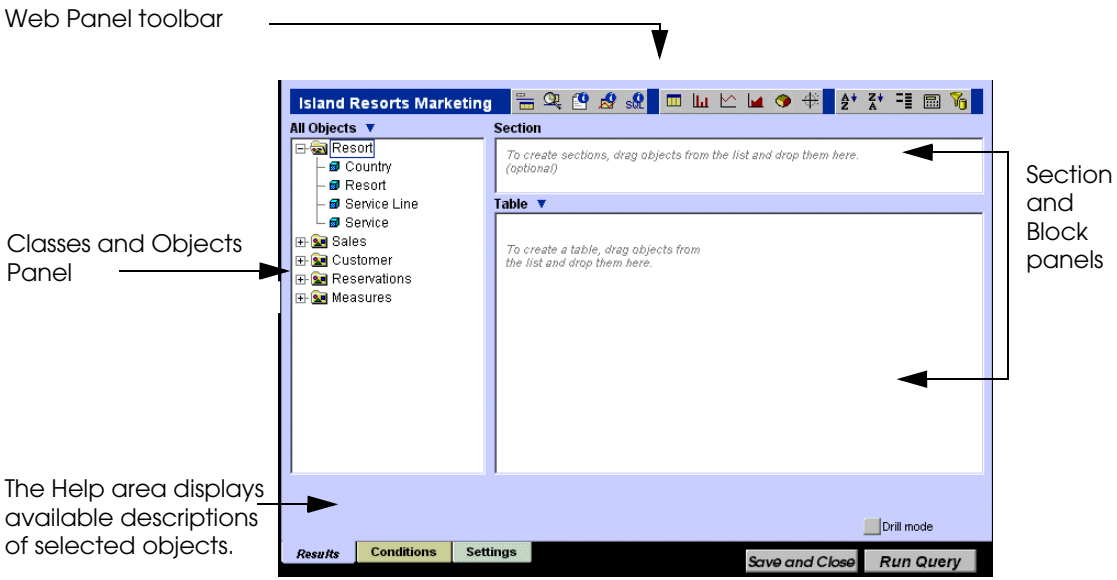
Although the Full and Light Java applets closely resemble each other, there are distinct differences between them. For more information about these differences, see page 53.

For a complete description of the Web Panel you're using, see:

- "The Java Web Panel" on page 49
- "The ActiveX Web Panel" on page 54

The Java Web Panel

The Java Web Panel looks like this:

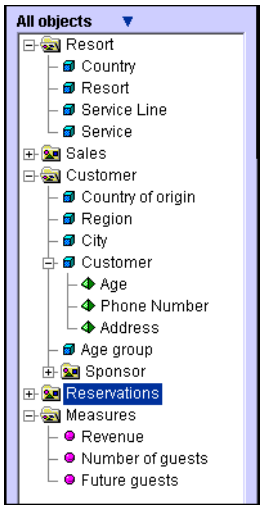


It has four parts:

- The Classes and Objects Panel to the left displays the data objects that belong to the universe you selected from the available universe list.
- The Section and Block (in the image above, labelled Table to reflect the default block type) panels to the right contain objects that have been added to the query from the Classes and Objects panel. These objects define both the data the query will retrieve from the database, and how that data is arranged in the document.
  See “Including Objects in a Query” on page 62.
- The Help area at the bottom left displays any description that the designer of the universe provided about a selected object in the Classes and Objects panel.
- The toolbar at the top gives you instant access to a variety of formatting and query-building features with just a click of the mouse.

The Classes and Objects Panel

The Classes and Objects panel contains a list of the classes and objects from the selected universe that you can use to build your query. The classes and objects are arranged into hierarchies. For example, a universe might contain these classes and objects:



Notice the order: the Customer class contains objects like Country of Origin and Region, but it also contains the Sponsor sub-class, which in turn contains objects. Furthermore, sub-classes like Customer and Sponsor contain detail objects. This order becomes especially important if you make the document drillable and use the Scope of Analysis feature (see "Making a Document Drillable" on page 207 and "Planning the Scope of Analysis" on page 208).

Note: For information about the types of data objects a universe can contain, see page 25.

By default, the Classes and Objects panel is set to All objects. You can click the down arrow to change its display:

- All Objects

  Displays all the classes and objects in the universe. Unless you're viewing a document in cube mode, this is the default.

- Hierarchies

  Displays only folders containing dimension objects, as well as those objects. When you select a Scope of Analysis, the Classes and Objects panel automatically changes to Hierarchies display.

- Query objects

  Displays only the objects used to generate the document. If you have only cube mode rights and are editing a document, this is the default setting, and you cannot change it.

Note: If you're creating or editing your own document, you have full rights to edit the query (i.e. change the data to be retrieved from the database and included in the document).
If you're editing a document created by another user, you may not see a hierarchy displayed in the Classes and Objects panel. Instead, you may only see a list of the actual dimension objects used to build the query. This means you can only work with the data in the document -- you cannot edit the query.

The Java Web Panel Toolbar

This toolbar is divided into three bars:

- The Format bar impacts both the format of your document and the layout of the Web Panel. From left to right:
  - Section and Block view
    Lets you toggle between a Section and Block work area, and a Block only work area.
  - Scope of Analysis
    Adds a Scope of Analysis area to the Web Panel.

- Document Settings
  Brings the Settings tab to the front of the Web Panel with document settings displayed, so that you can specify settings such as the title, or whether or not the document is drillable.
- Block Settings
  Brings the Settings tab to the front of the Web Panel with block settings displayed.
- Show SQL
  Displays the SQL structure for the query, if you have the appropriate user rights.

- The Block Type bar contains options for creating different block types. From left to right:
  - Tables
  - Bar Charts
  - Line Charts
  - Area Charts
  - Pie Charts
  - Radar Charts

  For information about different document formats and how to create them, see chapter 4 “Working with Block Types”.
- The Feature bar lets you change data’s presentation and limit query results. From left to right:
  - Add Ascending Sort
    Sorts the data in ascending order.
  - Add Descending Sort
    Sorts the data in descending order.
  - Add Break
    Breaks the data up into separate blocks.
  - Add Calculation
    Adds a calculation function to an object.
  - Add Condition
    Adds a condition to the object that further restricts the data retrieved.

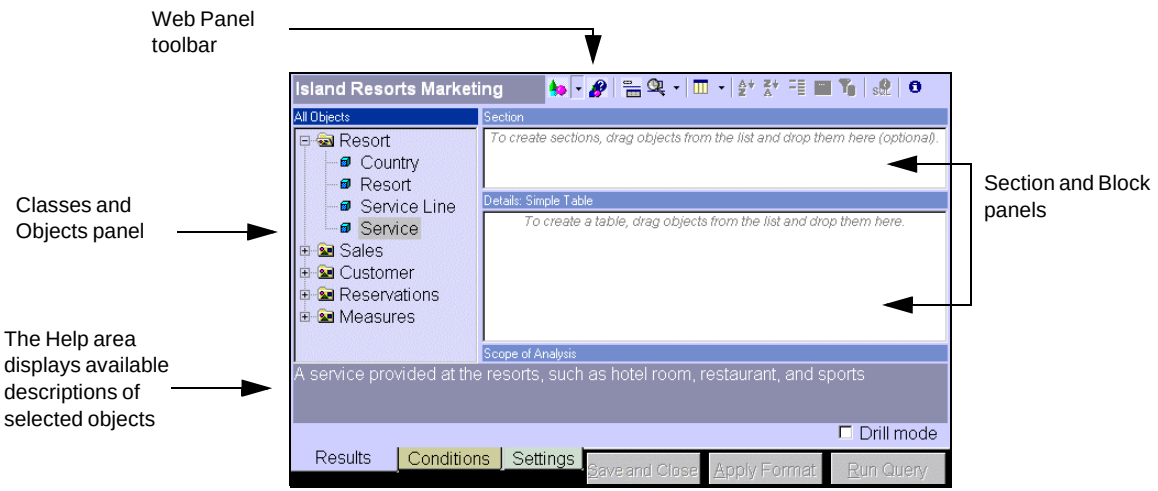
How Do the Full and Light Java Web Panel Applets Differ?

Although the Full and Light Java Web Panel applets closely resemble each other, there are differences between the two:

- The Light applet toolbar contains a Help link which opens and closes descriptions of selected objects in the Classes and Objects panel.
- There is no Drill mode link at the bottom of the Section/Detail panels in the Light applet.
- In the Light Applet, you cannot specify one, two, or three levels down for the scope of analysis. You must set a custom scope of analysis by dragging objects from the Hierarchies list and dropping them in the Custom Scope of Analysis section.
- In the Light applet, there are no Shift Right and Shift Left buttons in the toolbar for combining conditions. You can still combine conditions, however, by dragging them to the right or left.
- If you're using a chart presentation for a document's blocks of data:
  - There are differences in the appearances of some charts in the Light and Full Java applets.
  - In the Light applet, there is only one toolbar button for choosing a chart format. This opens a dialog box from which you can choose the type of presentation you want for the data blocks in your document.
  - In the Full applet, when you change a chart, the objects in the chart are removed if they no longer fit the new presentation. In the Light applet, inappropriate objects are moved to another place in the query definition.
- In the Full applet, you can remove an object by dragging it from the Section/Detail panels and dropping it back in the Classes and Objects panel. In the Light applet, you can remove an object by dragging it outside the browser window.

The ActiveX Web Panel

The ActiveX Web Panel looks like this:



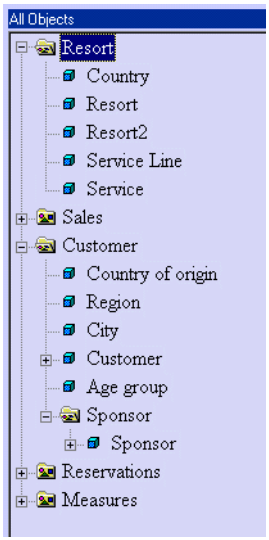
It has four parts:

- The Classes and Objects panel to the left displays the data objects that belong to the universe you selected from the available universe list.
- The Section and Block (in the image above, labelled Table to reflect the default block type) panels to the right contain objects that have been added to the query from the Classes and Objects panel. These objects define both the data the query will retrieve from the database, and how that data is arranged in the document.
  See “Including Objects in a Query” on page 62.
- The Help area at the bottom left displays any description the universe’s designer provided about a selected object in the Classes and Objects panel. You can deactivate or reactivate this display using the Toggle Help Display button in the toolbar.
- The toolbar at the top of the Web Panel gives you instant access to a variety of formatting and query-building features with just a click of the mouse.

Note: The ActiveX Web Panel provides several practical features that aren’t included in the Java version. See page 59.

The Classes and Objects panel

The Classes and Objects panel contains a list of the classes and objects from the selected universe that you can use to build your query. The classes and objects are arranged into hierarchies. For example, a universe might contain these classes and objects:



Notice the order: the Customer class contains objects like Country of Origin and Region, but it also contains the Sponsor sub-class, which in turn contains objects. Furthermore, sub-classes like Customer and Sponsor contain detail objects. This order becomes especially important if you make the document drillable and use the Scope of Analysis feature (see “Making a Document Drillable” on page 207 and“Planning the Scope of Analysis” on page 208).

Note: For information about the types of data objects a universe can contain, see page 25.

By default, the Classes and Objects panel is set to All objects. To change this display, click the down arrow next to the to Left Pane Display toolbar button, then click one of the following choices:

- All Objects

  Displays all the classes and objects in the universe. Unless you’re viewing a

document in cube mode, this is the default.

- Hierarchies Objects

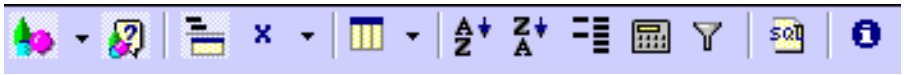
  Displays only folders containing dimension objects, as well as those objects. When you select a Scope of Analysis, the Classes and Objects panel automatically changes to Hierarchies display.

- Query objects

  Displays only the objects used to generate the document. If you have only cube mode rights and are editing a document, this is the default setting, and you cannot change it.

Note: If you're creating or editing your own document, you have full rights to edit the query (i.e. change the data to be retrieved from the database and included in the document).
If you're editing a document created by another user, you may not see a hierarchy displayed in the Classes and Objects panel. Instead, you may only see a list of the actual dimension objects used to build the query. This means you can only work with the data in the document -- you cannot edit the query.

The ActiveX Web Panel toolbar



This dynamic toolbar tells you immediately which features are activated in the current document or Web Panel session:

Type of button	Example	Behavior
The button acts as a simple activate/ deactivate toggle	Display Help button	• When the feature is activated, the button is highlighted in light blue (see the first button in the image above). • When the feature is deactivated, the button's background is the same color as the toolbar background (see the last button in the image above).
The button gives you a choice between several actions	Scope of Analysis button	The icon corresponding to your selection appears in the place of the original button in the toolbar. For example, if you choose One Level in the list associated with the Scope of Analysis button, instead of the default button (see the fourth button from the left above), a button with the number 1 is displayed.
The Block Type button	Block Type button	Remains identical regardless of your block type choice.

From left to right, it contains the following buttons:

- Toggle Left Pane Display

  Click the arrow to its right to choose what kinds of objects are displayed in the Classes and Objects panel, if any.
- Toggle Help Display

  Turns the display of descriptions for objects selected in the Classes and Objects panel on and off.
- Toggle Section Display

  Lets you toggle between a Section and Block work area, and a Block only work area.
- Scope of Analysis

  Adds a Scope of Analysis area to the Web Panel.
- Change Block Type

  Lets you change the format for the blocks of data in your document.
  For information about different document formats and how to create them, see "Working with Block Types" on page 71.
- Insert Ascending Sort

  Sorts data in ascending order.
- Insert Descending Sort

  Sorts data in descending order.
- Insert Break

  Breaks data up into separate blocks.
- Insert Calculation

  Adds a calculation function to an object.
- Insert Condition

  Adds a condition to the object that further restricts the data retrieved.
- View Query SQL

  Displays the SQL structure for the query in a small window on top of the browser, if you have the appropriate user rights.
- About WebIntelligence Web Panel

  Displays information about this version of the WebIntelligence ActiveX Web Panel.

Using the ActiveX Web Panel

The ActiveX Web Panel provides the following practical features:

- You can resize the Web Panel window on your screen. This is very practical when you're working with several windows simultaneously.
- The ActiveX Web Panel has a dynamic toolbar that tells you what options are currently being applied to the document or Web Panel interface. See page 57.
- You can select several objects in the Detail panel at once, using standard Windows techniques. This is especially useful when you want to apply the same attribute to several objects, such as an ascending sort order.
- You can obtain a contextual menu by right-clicking any part of the Section or Detail panels or the objects they contain. Among other actions, this menu contains standard Windows Cut and Copy commands.
- When you use the Settings tab, the document display area to the right gives you a more accurate preview of the final document than in the Java version. In addition, you can define left, center and right headers and footers.

The Document Creation Process

To create a new WEBINTELLIGENCE document, follow these basic steps (which are described in more detail later in this chapter):

1. Select a universe and open the Web Panel.
2. Build the document query using the universe's objects.
3. Run the query by clicking the Run Query button.

The WEBINTELLIGENCE system processes your request and displays the resulting document on the Document Results page.

Note: If you want to save the query you have defined without running it. Click Save and Close. The report is saved with no data. You can retrieve the data and run the query by using the Refresh command.

Opening the Web Panel to Create a Document

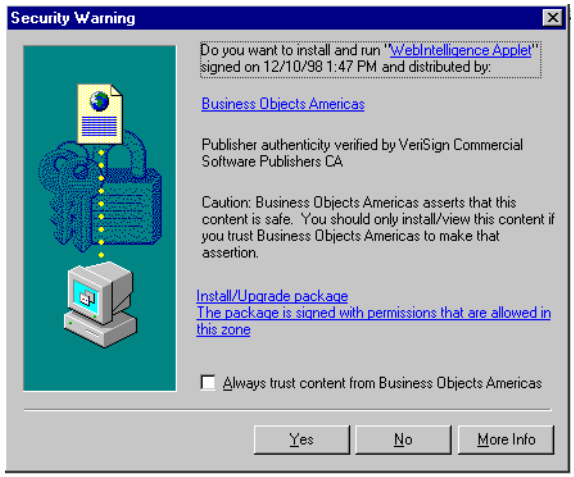
You open the Web Panel to create a new document by clicking the Create Documents link in the navigation bar:

- If you have the right to access more than one universe, the Available Universes page opens.

  It lists all the universes you have the right to access.
  Select the universe you want to base the new document on.
  The Web Panel opens with the selected universe's objects loaded in the Classes and Objects panel.
- If you've defined a default universe, the Web Panel opens immediately with that universe's objects loaded.

Opening the Web Panel for the first time

The first time you open the Web Panel, and any time you use a different form of the Web Panel for the first time, the following type of dialog box appears:



The type of Web Panel you are opening is indicated as a hypertext link in the first paragraph.

Click Yes if you want WEBINTELLIGENCE to install the specified Web Panel (applet or ActiveX control) on your machine.

If you don't want to use this type of Web Panel, click No, then specify another type in the Options page.

Searching for universes

If you're having trouble finding a particular universe, use the Search for box in the toolbar. To do a quick search:

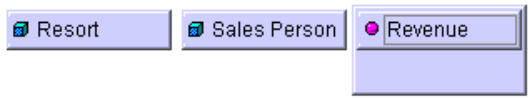
1. Enter part or all of the universe name in the entry box.
2. Press Enter.

The list of universes corresponding to your search criterion appears.

To return to the Available Universes page, click the Back button in your browser.

Including Objects in a Query

The image below displays three objects that have been added to the Block panel. Each of these objects represents a unit of data that WEBINTELLIGENCE will retrieve from the database when you run the query.



The sample query pictured above produces a simple table when you run it:

Resort	Sales Person	Revenue
Bahamas Beach	Fischer	69,696.00
Bahamas Beach	Galagers	207,784.00
Bahamas Beach	Ishimoto	180,348.00
Bahamas Beach	Nagata	4,700.00
French Riviera	Fischer	69,240.00
French Riviera	Galagers	246,395.00
French Riviera	Ishimoto	226,275.00
Hawaiian Club	Fischer	94,950.00
Hawaiian Club	Galagers	288,960.00
Hawaiian Club	Ishimoto	238,260.00

Notice that the columns in the generated document appear in the same order as the objects of the same name in the Web Panel.

Since the order of the objects in the Section and Block panels affects their order in a table or chart, you may sometimes need to rearrange the objects, or insert one object between two others.

The following table describes how to add objects to, remove them from, and rearrange them in queries:

	Actions on queries
To add an object	Double-click the object in the Classes and Objects panel. The object is added to the Detail panel. (You may need to drag it to the precise desired position.) **Note**: If you drag and drop a class or subclass, all of its objects may be inserted.

	Actions on queries
	Drag the object to the desired position in the Section/ Detail panels. **Note**: If you drop a class or subclass in the Detail panel, all of its objects may be inserted.
To remove an object	Drag the object back to the Classes and Objects panel.
	Right-click the object, then select Delete from the contextual menu (ActiveX Web Panel only).
	Select the object in the Section/Detail panel then press the Del key.
To insert an object between two other objects	Click and drag the object until the cursor is directly over one of the objects already in the Detail panel. The new object is inserted to the *left* of that object.
To move an object	Drag the object to the desired position.

Should you add an object to the Section or Block panel?

Simply using the Block panel, you can create new documents. These documents can contain standard tables or more complex crosstabs to display the information you need, such as the following:

Table Format

Customer	Address	Phone Number
Arai	941 Toyota Ave	3478 4597
Baker	2890 Grant Avenue	(312) 555 7040
Brendt	10 Jasper Blvd.	(212) 555 2146
Diemers	Wiesenstraße 40	23 5345
Dupont	37 rue Murat	46 72 23 53
Durnstein	Thomashof 22	74 5464
Edwards	68 Downing Street	243 867945
Gentil	17montee des Chenes	65 62 26 13
Goldschmidt	91 Torre drive	(619) 555 6529

Crosstab Format

		Bahamas Beach	French Riviera	Hawaiian Club
		Revenue	Revenue	Revenue
Accommodation	Bungalow	142,720.00	126,240.00	191,850.00
	Hotel Room	189,888.00	116,790.00	398,190.00
	Hotel Suite	341,056.00	320,220.00	391,170.00
Food & Drinks	Fast Food	16,080.00	28,440.00	38,850.00
	Poolside Bar	38,080.00	46,320.00	35,200.00
	Restaurant	115,520.00	32,640.00	203,700.00
Recreation	Activities	65,600.00	9,000.00	101,100.00
	Excursion	42,500.00	120,050.00	89,000.00
	Sports	20,000.00	35,720.00	30,600.00

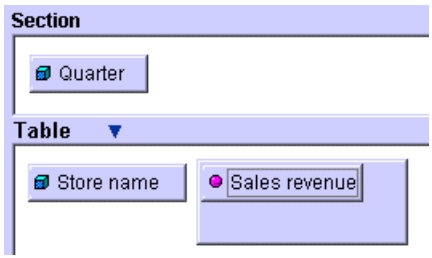
Note: For more information about creating documents with either of these formats, see “Tables” on page 77 or “Crosstabs” on page 83.
In some cases, a simple table may not suffice for your needs. WEBINTELLIGENCE offers a range of tables and charts you can use to display your information. See “Working with Block Types” on page 71.

When you drop an object into the Section panel, however, you add an entirely new dimension by breaking the document into parts, or *sections*.

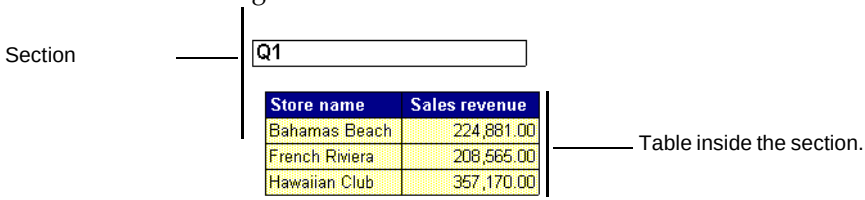
Example **Creating a section by dropping an object in the Section panel**

You want to create a simple table document containing sales revenue data for a set of stores. You want a separate block of data, however, for each quarter.

To do this, you arrange the relevant data objects in the Section and Block panels in the following way:



The resulting document contains sections that look like this:



For more information, see “Breaking a Document into Parts” on page 153.

Running Queries

Once you've completed adding, modifying, and/or arranging the objects corresponding to the data you want to include in the document, run the query by clicking the Run Query button.

If you're using the Full Java applet or ActiveX control Web Panel, you can cancel the query at any time by clicking the Cancel Query button at the bottom right of the Panel.

When you run a query, the Web Panel submits the query to the WEBINTELLIGENCE server, which processes the query, retrieves the data from the database, and builds the document. The browser fetches the resulting document from the server and displays it in the Document Results page.

Note: If you then decide to re-edit the document, and you make changes that concern formatting only, click the Apply Format button instead. This button applies formatting changes to the document using the existing data.
If you subsequently change any of the data needed for the document, however, the Apply Format button is no longer available in the Web Panel, and you must click the Run Query button again.

If when you try to run a query, the Web Panel doesn't immediately submit the document to the WEBINTELLIGENCE server, there may be an ambiguous context, or a condition requiring you to fill in information. For information about dealing with these situations, see "Resolving Context" on page 67, and "Resolving Condition Prompts" on page 69.

Note: If you want to save the query you have defined without running it. Click Save and Close. The report is saved with no data. You can retrieve the data and run the query by using the Refresh command.

Saving the definition of a query

You can build a query without having to run it right away. The Save and Close feature lets you:

- Save a query so that you can continue defining it at a later stage.
- Save a query that you have finished defining, but that you do not want to run right away, for example because you know network traffic is heavy.

To build a query and save its definition:

1. Build a query by moving objects into the Result Objects and Conditions boxes in the Query Panel.
2. Click Save and Close.

   The following message displays:

   "This report was saved with no data. Click Refresh to retrieve the data."
3. To display the data in the report, click Refresh.

Resolving Context

WEBINTELLIGENCE may not understand what information you want from the objects you've dropped into the Section/Block panels. How objects relate to one another is not always clear; that is, the objects' *context* is ambiguous. When an ambiguity like this arises, the Web Panel lets you specify how you want the relationship to be interpreted.

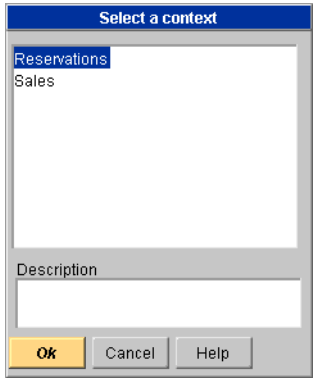
Example **Resolving a query's context**

The Block panel contains the Customer and Country objects.

Note that the Country object doesn't represent the country in which the customer lives (that's actually represented by another object, Country of Origin). Instead Country represents the country containing the resort the customer patronized.

WEBINTELLIGENCE doesn't know what information you're asking for with this query. Customers and the countries in which they vacationed? Or customers and the countries in which they have reservations? Both of these are valid, since

customers have essentially two states: existing customers, who have already been to a resort, and future customers, who have reservations at a resort. When you try to get results from this query, the Web Panel pops up the following dialog:



You must now decide whether you want information about existing customers or future customers. Simply select the context you want to use, in this case reservations or sales, and click OK. WEBINTELLIGENCE then completes the query and returns the results in the Document Results page as usual.

Resolving Condition Prompts

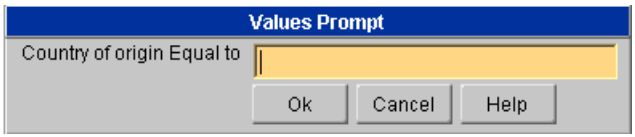
Prompts provide a way to ask for input from users when they run queries. Prompts can be the result of user-defined conditions, predefined conditions, or the definition given to the object by its universe's designer.

For information about creating condition prompts, see Step 2 in "Applying user-defined conditions and filters" on page 133. This prompt asks for information that is then used in the condition when the query is submitted.

Example **Resolving a condition prompt**

You have a complex query you want to be able to run at any time. But you also need to be able to make changes, to obtain document data for customers of different nationalities. You can add a condition to the document that limits customer nationality, but instead of defining a list of specific condition options, you can define a prompt. In this case, the condition object itself looks like this:

When you click the Run Query button, the following dialog appears:



Type in the desired value (it must correspond to data in the database), then click OK.

Editing an Existing WebIntelligence Document

Note: You cannot edit a BUSINESSOBJECTS document within WEBINTELLIGENCE.

Editing an existing WEBINTELLIGENCE document means opening it in the Web Panel, then adding or removing objects, changing the formatting, changing the data arrangement, or modifying conditions.

You can always edit your own WEBINTELLIGENCE documents. You can also edit those sent to you by other users, providing you have the right to query the universe used to create the document.

If you modify an existing corporate document then publish it, WEBINTELLIGENCE saves it under a new ID in the corporate repository, and both it and the original document are displayed on the Corporate Documents page.

To edit an existing document:

1. Open the document in the Document Results page by clicking its name in any InfoView document list.
2. Click Edit in the toolbar.

   WEBINTELLIGENCE opens the document definition in the Web Panel, where you can edit it.
3. Once you've completed your changes to the document, do one of the following:
   - If you've added any objects to the query, click the Get Results button. This runs your modified query.
   - If you've made changes in formatting only, click the Apply Format button instead. Instead of re-executing the query, this simply applies formatting changes to the document.

   WEBINTELLIGENCE regenerates the document and displays it in the Document Results page.

Chapter 4 Working with Block Types

In this chapter

Selecting the Block Type

By default, the blocks of data in the documents you generate are displayed as simple tables. How you change the format of the blocks in your document varies depending on whether you're using the Java or the ActiveX Web Panel. The following section explains how to do this.

In addition, you can also change the block type of an existing document directly from the Document Results page.

Selecting a Block Type in the Java Web Panel

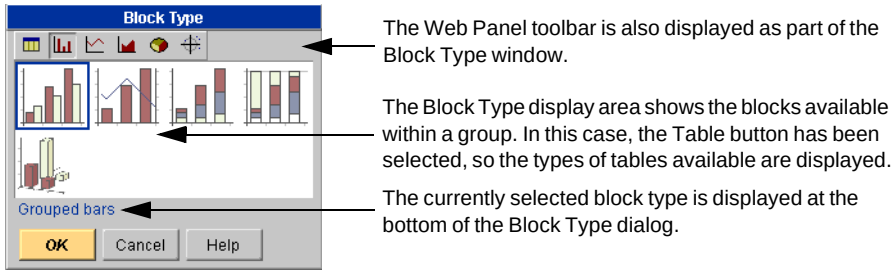
To select a block type in the Java Web Panel:

1. From the Block Type section of the toolbar, click the button that represents the block type that you want to create.

   For example, if you want to create a bar chart, click the Bar Chart button on the toolbar:

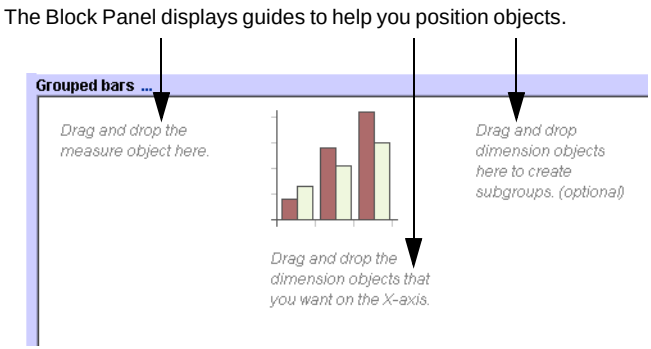
   The Block Type dialog opens.

   The display area contains pictures of available bar chart block types.



2. Click OK.

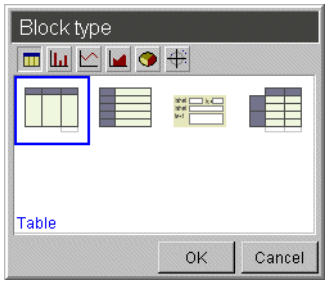
The Block panel changes to reflect the type of block you selected. Written guides also appear in the Block panel to help you arrange the objects.



Selecting a Block Type in the Light Java Web Panel

To select a block type in the Light Java Web Panel:

1. In the toolbar, click the Change Block Type button. The Block type dialog box opens.



2. Click the button that represents the block group you want.

   The display area changes to display the block types or sub-types in that group.

3. Click the picture that matches the block you want to create.

   The block type name is displayed at the bottom of the window.

4. Click OK.

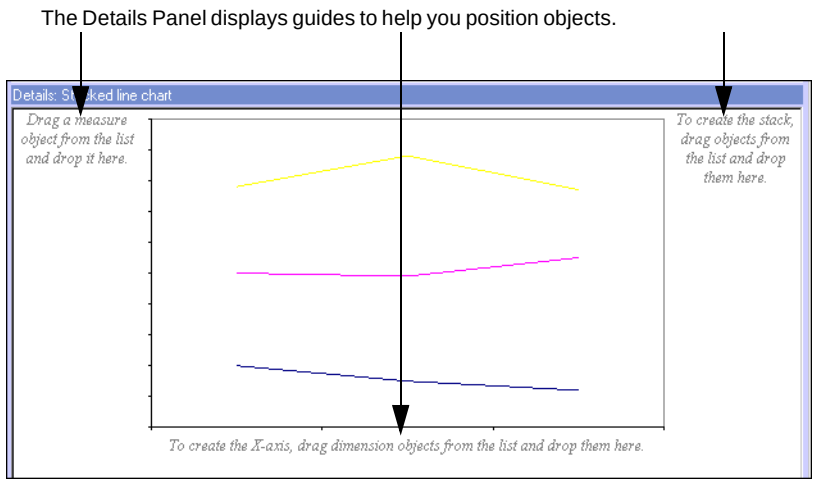
   The Block panel changes to reflect the type of block you selected. Written guides also appear in the Block panel to help you arrange the objects.

Selecting a Block Type in the ActiveX Web Panel

To select a block type in the ActiveX Web Panel:

1. In the toolbar, click the Change Block Type button or the down arrow next to it. A menu of block groups opens.
2. Click the group that includes the desired block type. Another menu opens, containing all the block types in that group, and illustrating each type with an icon.
3. Click the block type you want.

   The Block panel changes to reflect the type of block you've selected, and the block name appears in the title bar of the Detail panel. Written guides also appear in the Details panel to help you arrange the objects.



Changing the Block Type from the Document Results Page

Once a block is created and displayed in the Document Results page, you can change the block type without returning to the Web Panel. Instead, just click one of the Block Type buttons displayed on the right side of the Document Results page.

If these buttons aren't already displayed, click the arrow at the upper right-hand corner of the Document Results page.

The block types that are available depend on the original block type selected. For example, if you create a block with an X,Y axis only, you cannot select a block type that uses an X,Y, Z axis unless you return to the Web Panel and edit the query.

The following pages present the block types available in WEBINTELLIGENCE to help you choose the most effective format for your data.

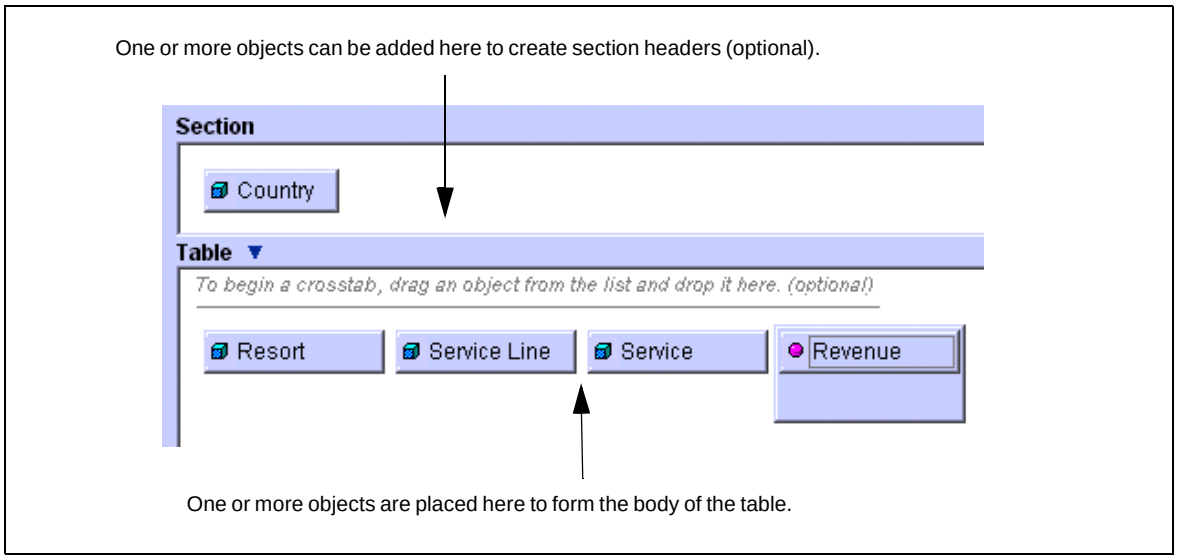
Block Types

Tables

France

Resort	Service Line	Service	Revenue
French Riviera	Accommodation	Bungalow	$126,240.00
French Riviera	Accommodation	Hotel Room	$116,790.00
French Riviera	Accommodation	Hotel Suite	$320,220.00
French Riviera	Food & Drinks	Fast Food	$28,440.00
French Riviera	Food & Drinks	Poolside Bar	$46,320.00
French Riviera	Food & Drinks	Restaurant	$32,640.00
French Riviera	Recreation	Activities	$9,000.00
French Riviera	Recreation	Excursion	$120,050.00
French Riviera	Recreation	Sports	$35,720.00

Table



Arrangement of Objects used to Create the Table

Description

A table is a sequential, two-dimensional list. This doesn't imply that the data in a table is simple or uncomplicated: you can present a great deal of data in a table.

The layout of columns within a table is directly related to the layout of the objects within the Block panel. WEBINTELLIGENCE places the cells in the table in the same order in which they appear in the Block panel.

Suitable for

Presenting data in a tabular, two dimensional list.

Keep in mind

- Arrange the objects in the order you want them to appear in the block.

  For example, if you want each row to have a salesperson's name, address, and the amount of sales revenue that person has generated, in that order, arrange the objects representing name, address, and revenue in a single row in that order in the Block panel.
- Whether your document includes sections or not, you always lay out the body of the table in the Block panel.

Financial Tables

France

French Riviera

Quarter	Q1	Q2	Q3	Q4
Service Line	Accommodation	Accommodation	Accommodation	Accommodation
Revenue	$139,470.00	$165,720.00	$153,450.00	$104,610.00

US

Bahamas Beach

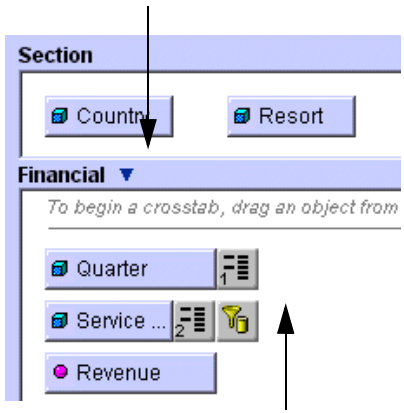
Quarter	Q1	Q2	Q3	Q4
Service Line	Accommodation	Accommodation	Accommodation	Accommodation
Revenue	$167,296.00	$177,272.00	$175,472.00	$153,624.00

Hawaiian Club

Quarter	Q1	Q2	Q3	Q4
Service Line	Accommodation	Accommodation	Accommodation	Accommodation
Revenue	$237,810.00	$226,530.00	$260,190.00	$256,680.00

Financial Table

One or more objects can be added here to create section headers (optional).



One or more objects are placed here to form the body of the Financial table.

Arrangement of Objects used to Create the Financial Table

Description

A Financial table is similar to a basic table, but the header and information are displayed vertically, instead of horizontally.

When you set the block type to Financial, the Financial Block panel looks identical to the Table Block panel. However, if you double-click objects (instead of dragging and dropping them into the Block panel), the objects are automatically arranged into vertical, rather than horizontal rows.

Suitable for

Presenting data in a vertical format.

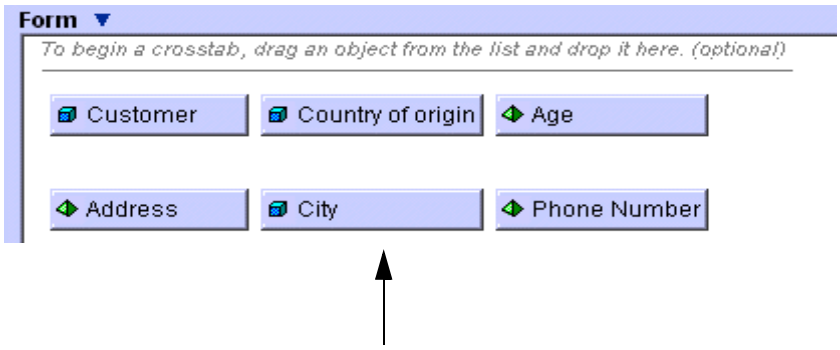
Keep in mind

- Arrange the objects in the order you want them to appear in the block.
- Whether your document includes section or not, you lay out the body of the table in the Block panel.

Forms

Customer	Arai	**Country of origin**	Japan	**Age**	18
Address	941 Toyota Ave	**City**	Tokyo	**Phone Number**	3478 4597
Customer	Baker	**Country of origin**	US	**Age**	64
Address	2890 Grant Avenue	**City**	Chicago	**Phone Number**	(312) 555 7040
Customer	Brendt	**Country of origin**	US	**Age**	19
Address	10 Jasper Blvd.	**City**	New York City	**Phone Number**	(212) 555 2146

Form



Arrangement of Objects used to Create the Form

Description

A form is a design in which each entry has multiple rows. For example, you want each entry in the block to have four rows:

- The first containing the customer name
- The second containing address and phone number (which are two separate detail objects in the Customer class)
- The third containing the customer's nationality
- The fourth containing the age group to which the customer belongs

Suitable for

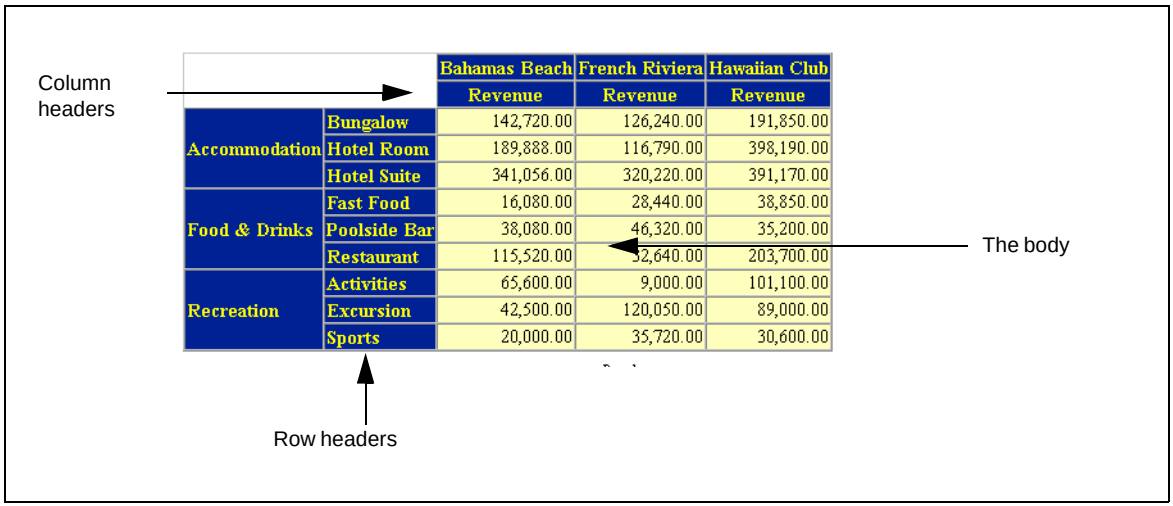
Presenting data in multiple rows.

Keep in mind

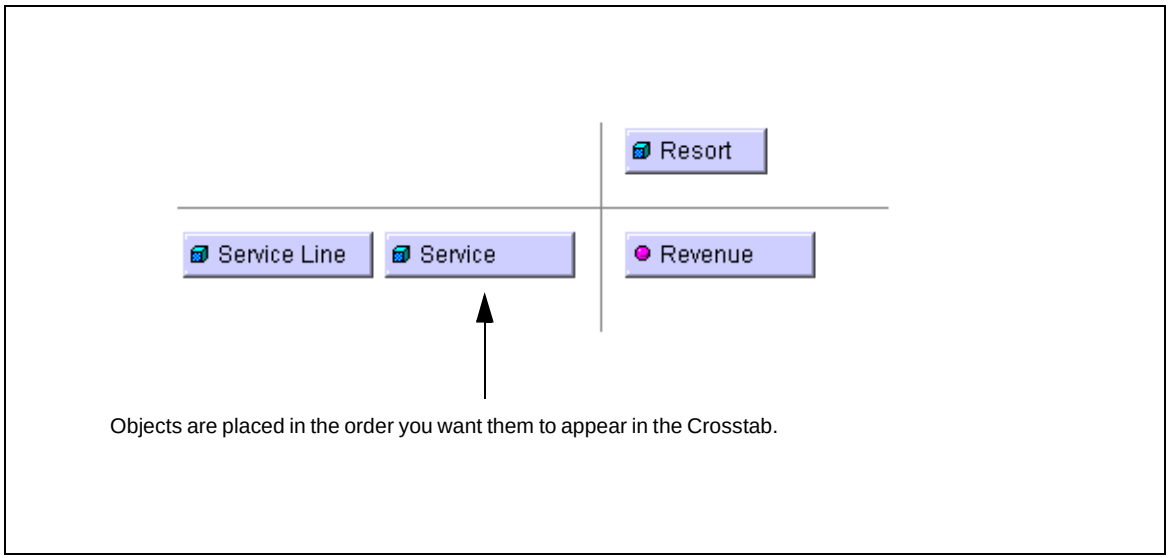
- Arrange the objects in the order you want them to appear in the block.

  For example, if you want each row to have a salesperson's name, address, and the amount of sales revenue that person has generated, in that order, arrange the objects representing name, address, and revenue in a single row in that order in the Block panel.
- You can create forms in either Section/Block mode or Block mode. In both cases you lay out the body of the form in the Block panel.

Crosstabs



Crosstab



Arrangement of Objects used to Create the Crosstab

Description

In a crosstab, data is displayed in columns and rows just as it is in tables. As opposed to tables, however, each column has at last one header, and each row has at least one row header. Corresponding data appears at the intersection of the column and row headers: this section is known as the "body."

The example crosstab displays revenue per service per quarter. The service labels are row headers, quarter labels are column headers. The revenue for each service for each quarter appears in the body.

To understand how items are laid out in a crosstab, picture the crosstab as a finished block. Objects placed in the lower-left quadrant of the crosstab provide the data for row headers, objects placed in the upper-right quadrant provide the data for column headers, and objects in the lower-right quadrant provide the data for the table body. You can't place any objects in the upper-left quadrant.

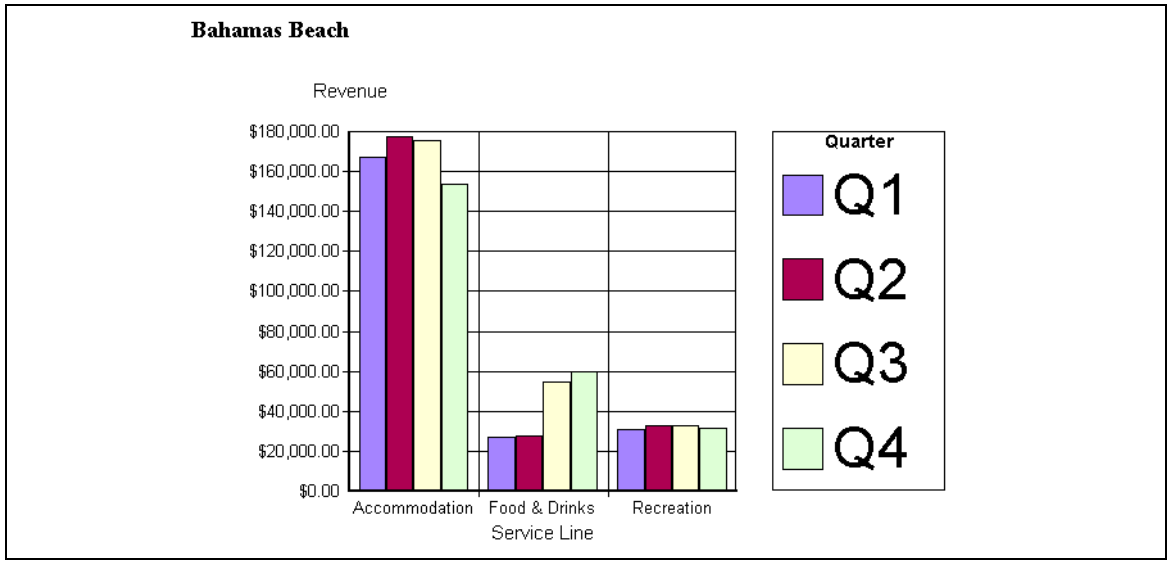
Suitable for

Presenting information in a multidimensional row/column format where one particular item is associated with another. For example, a type of service might be associated with a particular resort.

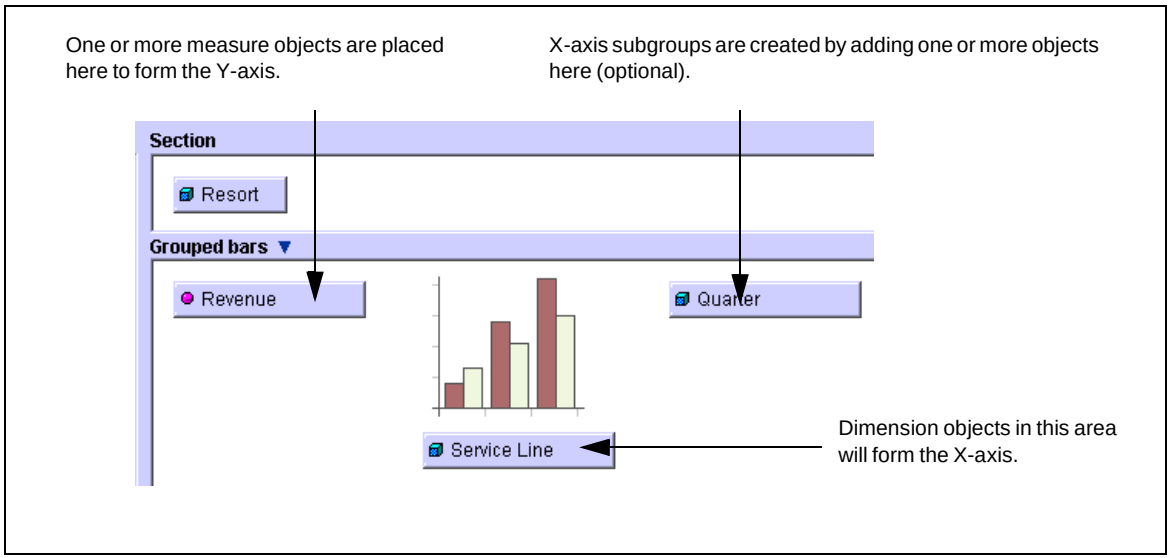
Keep in mind

- Arrange the objects in the order you want them to appear in the block.
- Whether your document contains sections or not, you lay out the body of the table in the Block panel.
- Measure objects cannot be used in the vertical or horizontal headers; they can only be used in the body of the crosstab.
- You can use more than one object in the body of the crosstab.
- You can use more than one object in the vertical or horizontal headers. For example, you might use both the Service Line and Service objects in a header, so that both the service line and the type of service are displayed in the crosstab.
- The objects do not have to be part of the same class. You could, for instance, use the Service Line and Resort objects to display information per service line per resort.

Grouped Bar Charts



Grouped Bar Chart with Vertical Legend



Arrangement of Objects used to Create the Grouped Bar Chart

Description

A grouped bar chart displays the data in bar form.

Suitable for

Making comparisons between groups of data, particularly when you want to compare one period of time to another (for example, you could use a bar chart to compare sales per quarter). A grouped bar chart is also a good graphical alternative to a crosstab block.

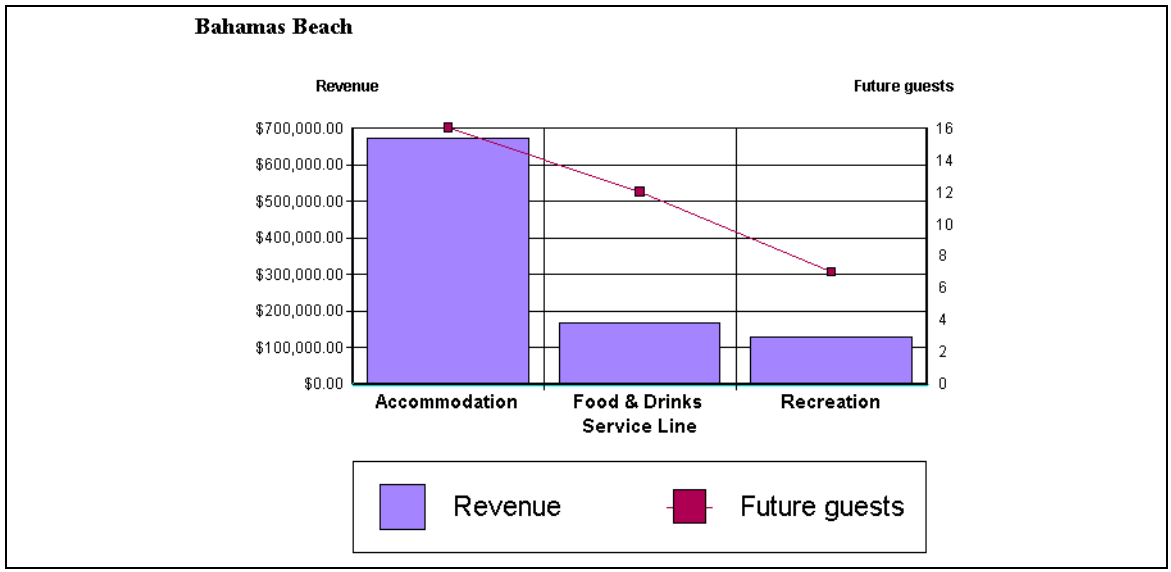
Keep in mind

- When you build the query, the measure object is always placed in the Y-axis (i.e. vertical axis) area.
- If you place objects in the subgroup area of the Block panel, you can only use one measure object in the bar chart.

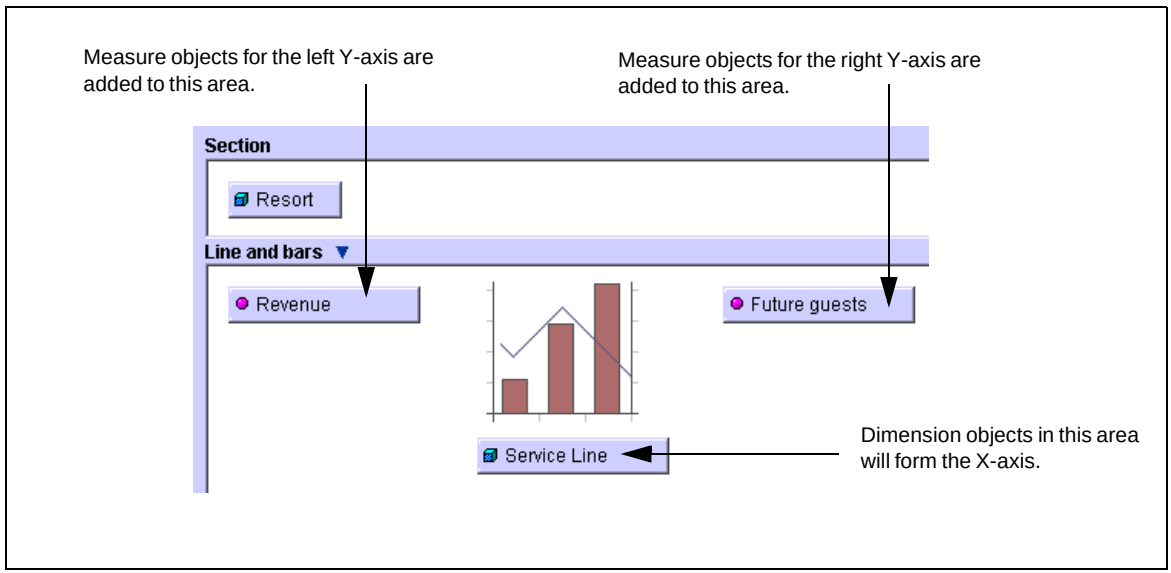
Grouped bar chart tips

You can give the chart a 3D look.

Line and Bar Charts



Line and Bar Chart with Horizontal Legend



Arrangement of Objects used to Create the Line and Bar Chart

Description

This chart lets you combine lines and bars. The line data points are plotted against the right Y-axis, while the bar data is plotted against the left Y-axis.

Suitable for

- Comparing trends between two different groups of data -- one group of data is represented by a line, the other group is represented by bars.
- Comparing data of differing magnitudes. For example, you could compare total revenue with average revenue.
- Comparing groups of data which use a different scale and units of measure.

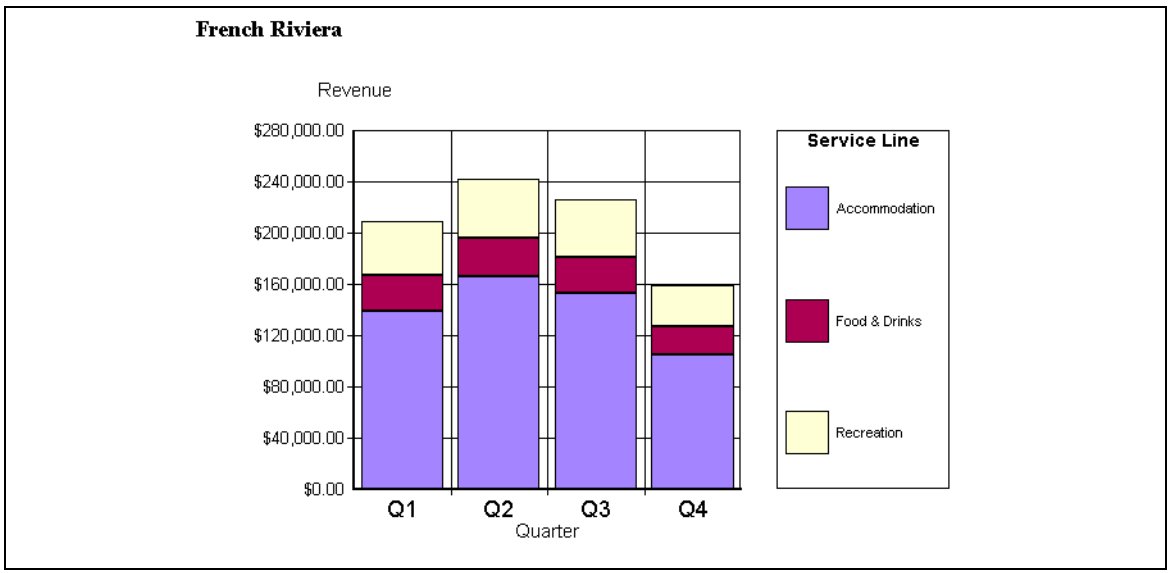
Keep in mind

Limit the data groups. Use one measure object per Y-axis (for a total of two measure objects) and use only one dimension object for the X-axis.

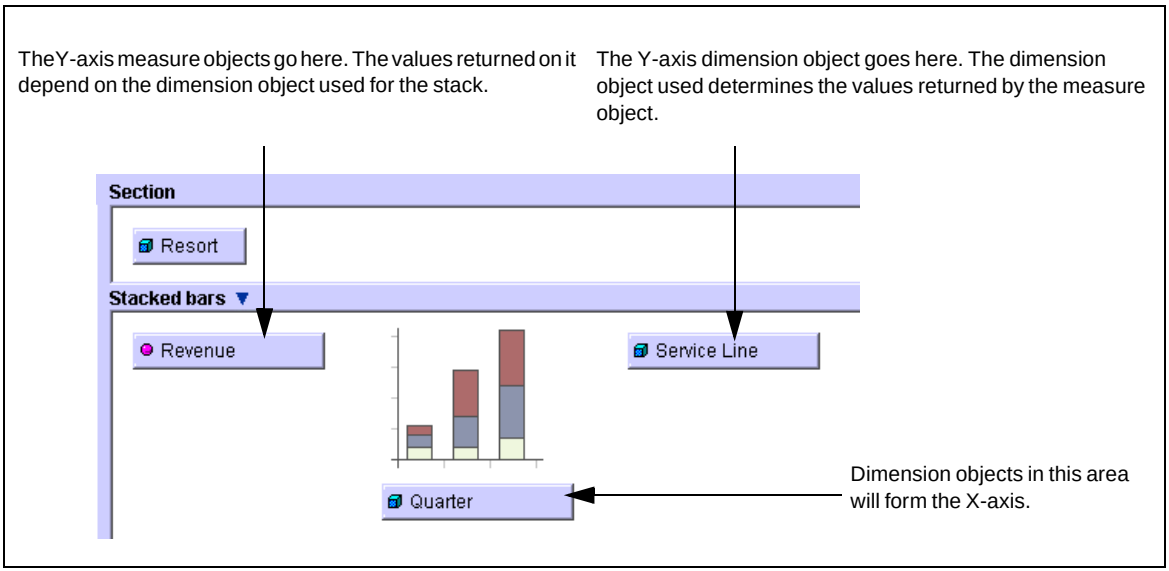
Line and bar chart tips

- You can give the chart a 3D look.
- You can flip the horizontal and vertical axes.

Stacked Bar Charts



Stacked Bar Chart with Vertical Legend



Arrangement of Objects used to Create the Stacked Bar Chart

Description

A stacked bar chart shows related data groups, one on top of the other.

In the example, Quarter forms the X-axis and Revenue forms the Y-axis. The per quarter revenue for each service line is stacked.

Suitable for

Use a stacked bar when you have several related groups of data and you want to show how each group contributes to the total.

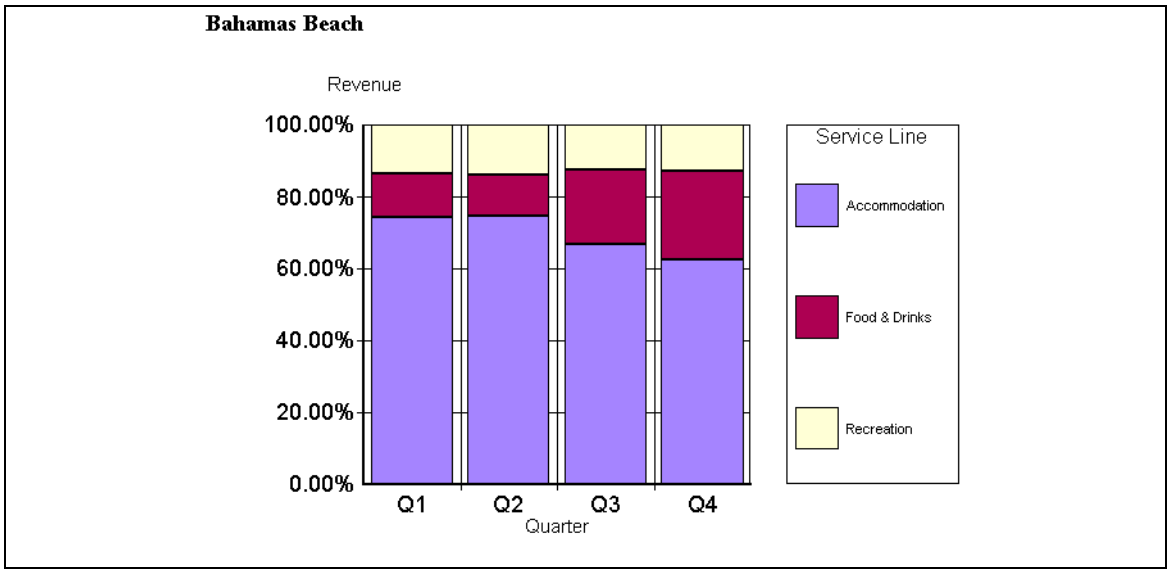
Keep in mind

You can use more than one measure object for the Y-axis as long as the objects are of the same type and scale, such as Number of Guests and Future Guests.

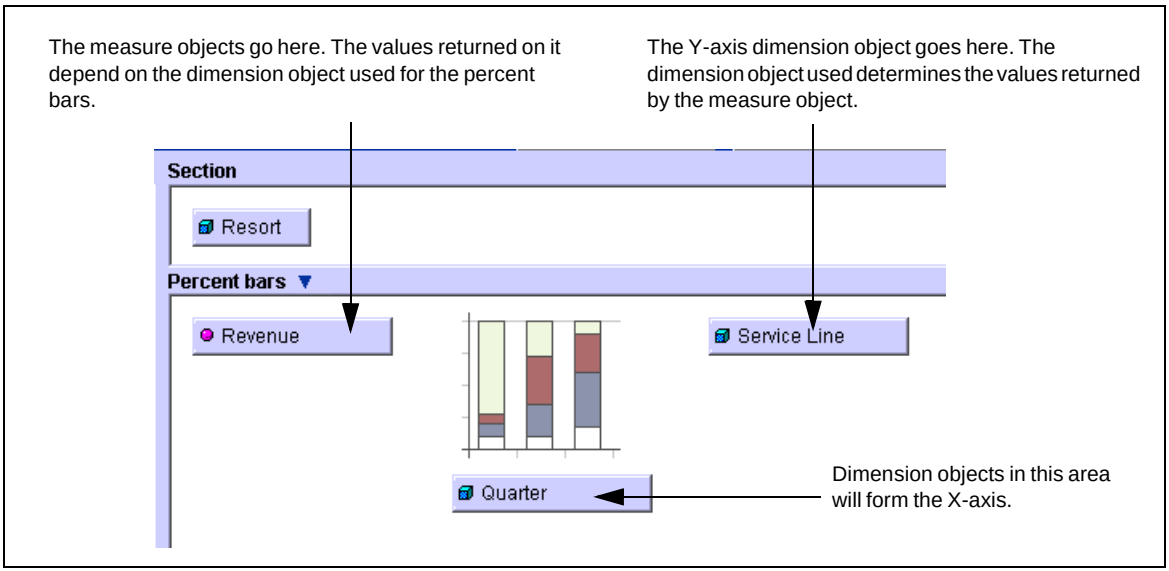
Stacked bar chart tips

- You can give the chart a 3D look.
- You can flip the horizontal and vertical axes.
- For best results, don't load up the X-axis with numerous dimension objects.

Percent Bar Charts



Percent Bar Chart with Vertical Legend



Arrangement of Objects used to Create the Percent Bar Chart

Description

A percent bar chart is similar to a stacked bar chart, except that it shows percentages of the total, while a stacked bar chart shows absolute values.

In the example, the chart shows what percentages the different services (Accommodation, Food & Drinks, and Recreation) contribute to the French Riviera resort's quarterly revenue.

Suitable for

Showing how group percentages contribute to the whole.

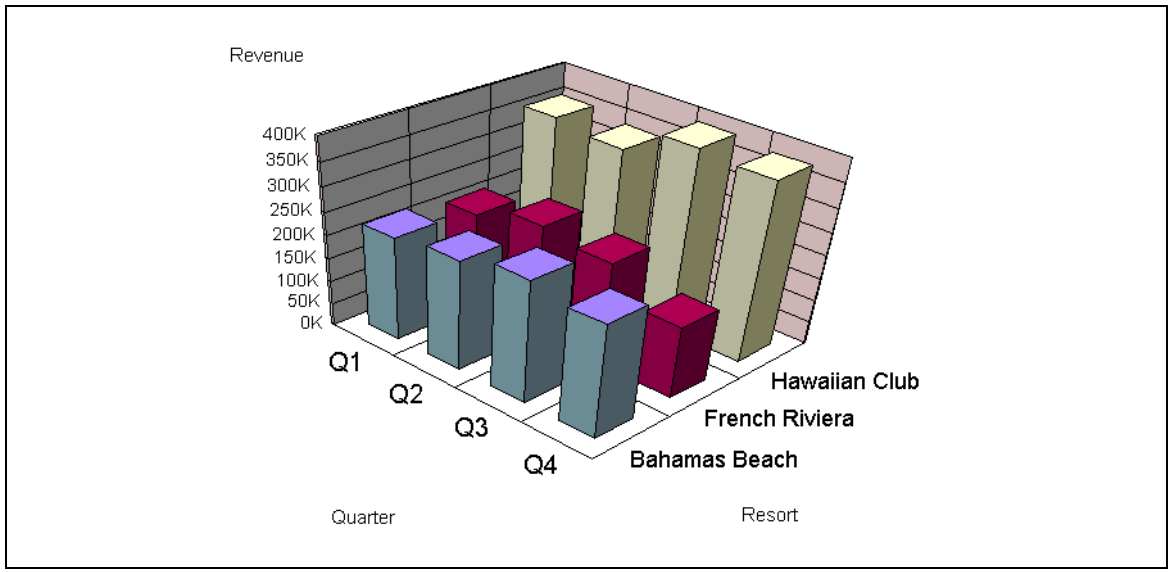
Keep in mind

You can use more than one measure object for the Y-axis as long as the objects are of the same type and scale, such as Number of Guests and Future Guests.

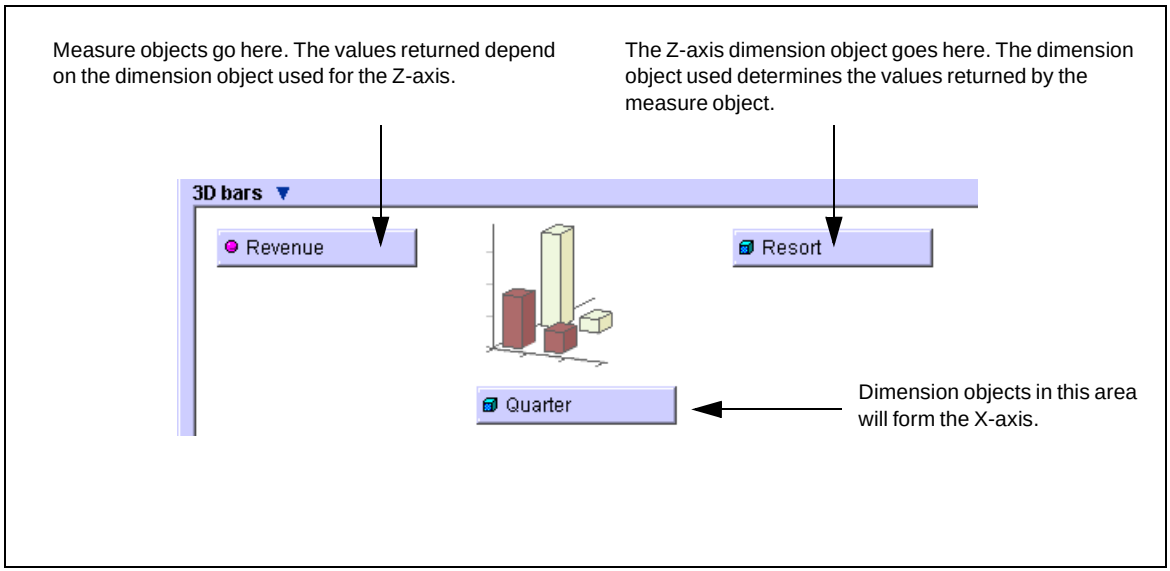
Percent bar chart tips

- You can give the chart a 3D look.
- You can flip the horizontal and vertical axes.
- For best results, don't load up the X-axis with numerous dimension objects.

3D Bar Charts



3D Bar Chart



Arrangement of Objects used to Create the 3D Bar Chart

Description

A 3D Bar chart displays the data in a 3D format. This makes it convenient to visually compare the bars.

When you build the query, the measure object is always placed in the Y-axis area.

Note: When you drill down on a bar in the 3D bar chart, you drill two objects simultaneously. For example, in the chart above, drilling down on the bar takes you from Quarter and Resort to Month and Service Line.

Suitable for

Making comparisons between groups of data, particularly when you want to compare one period of time to another (for example, you could use a bar graph to compare sales per quarter).

An alternative way to present crosstab-style information.

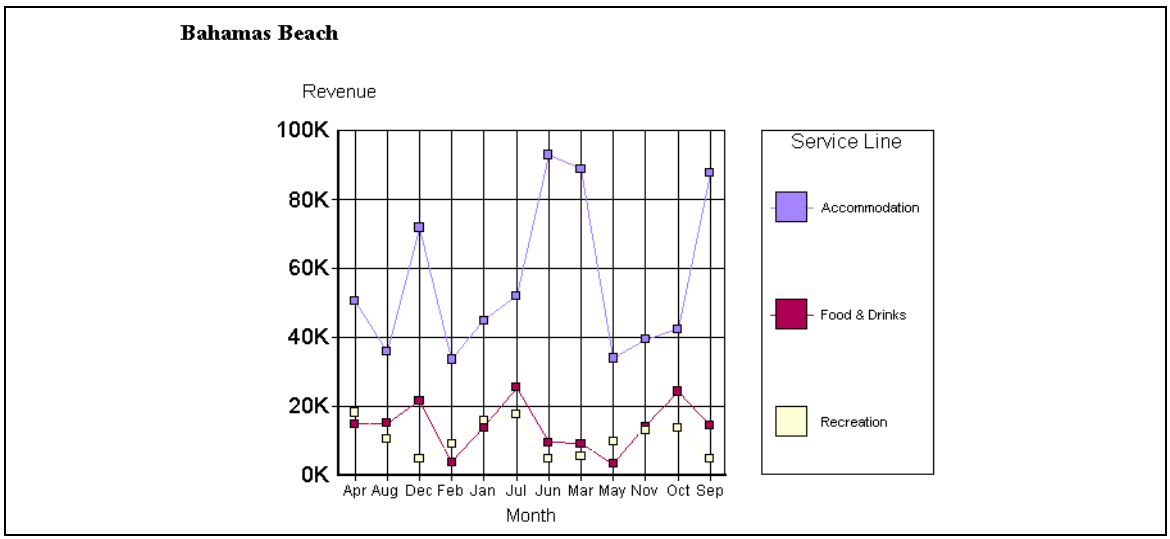
Keep in mind

You can use more than one measure object for the Y-axis as long as the objects are of the same type and scale, such as Number of Guests and Future Guests.

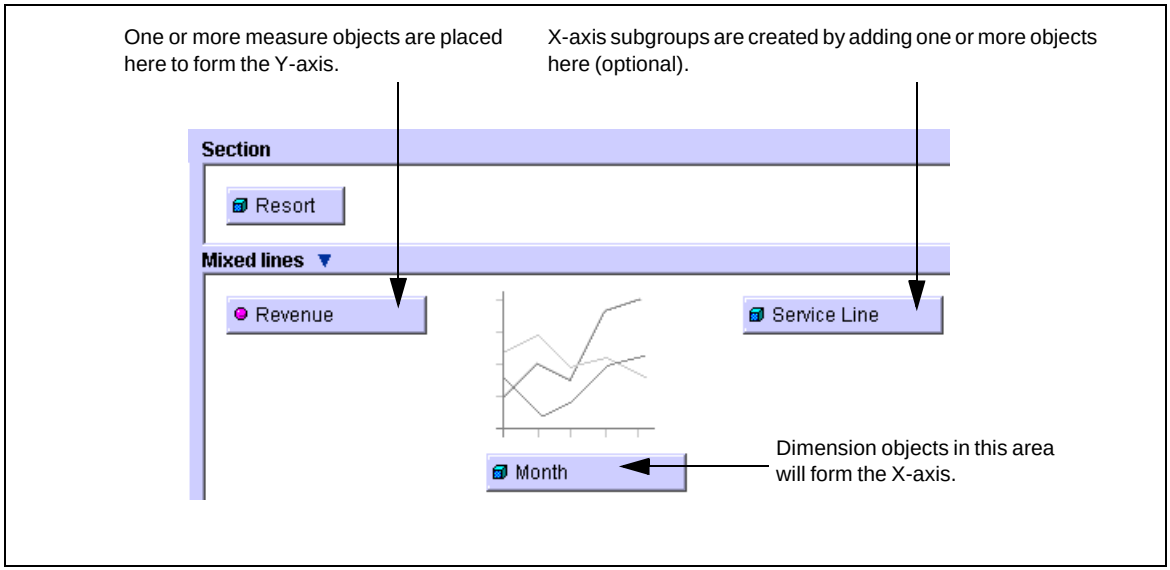
3D bar chart tips

- You can flip the horizontal and vertical axes.
- For best results, don't load up the X-axis with numerous dimension objects.

Mixed Line Charts



Mixed Lines Chart



Arrangement of Objects used to Create the Mixed Line Chart

Description

A mixed line chart presents the data groups as differently patterned lines.

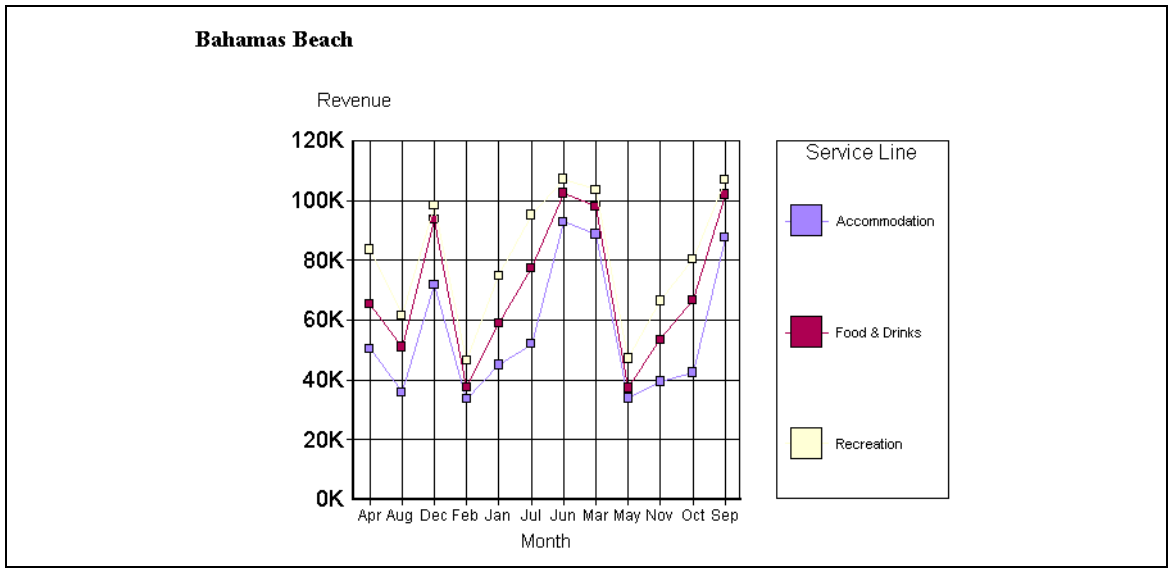
Suitable for

Showing trends or changes in data over time. This is particularly useful when you have several data points over one or more data groups.

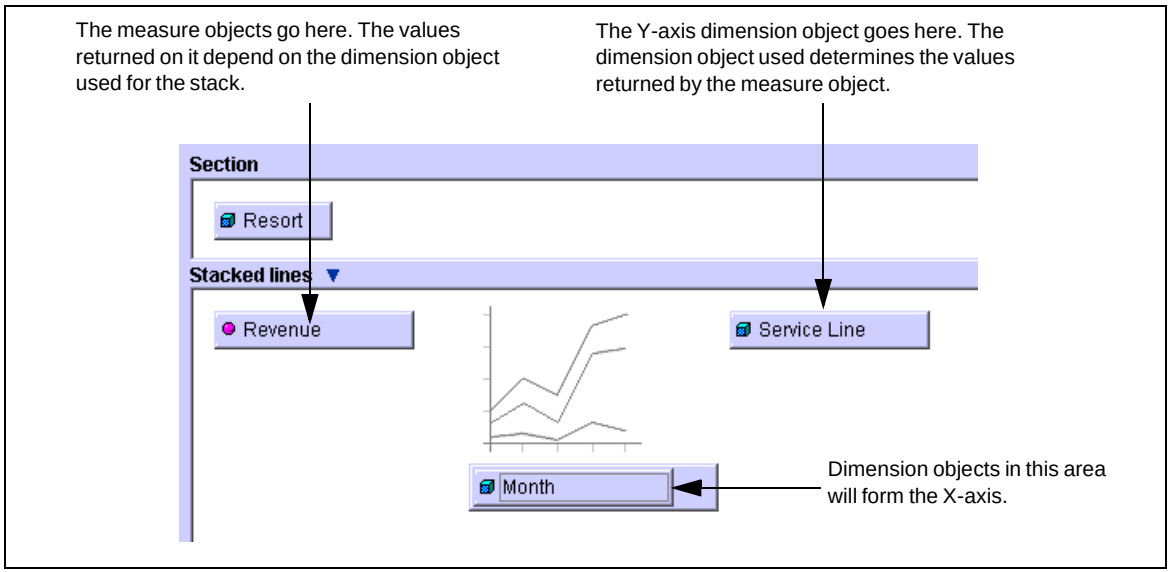
Mixed line chart tips

- You can give the chart a 3D look.
- You can flip the horizontal and vertical axes.
- For best results, don't load up the X-axis with numerous dimension objects.

Stacked Line Charts



Stacked Line Chart



Arrangement of Objects used to Create the Stacked Line Chart

Description

A stacked line chart shows related data groups, one on top of the other.

In the example, the Service Line forms the X-axis data and Service is included as a sub-group. The result is a chart which shows how the different services (Activities, Bungalow, Excursion, etc.) contribute to the total revenue for the Accommodation, Food & Drinks, and Recreation service lines.

Suitable for

Use a stacked line chart when you have several related groups of data and you want to show how each group contributes to the total.

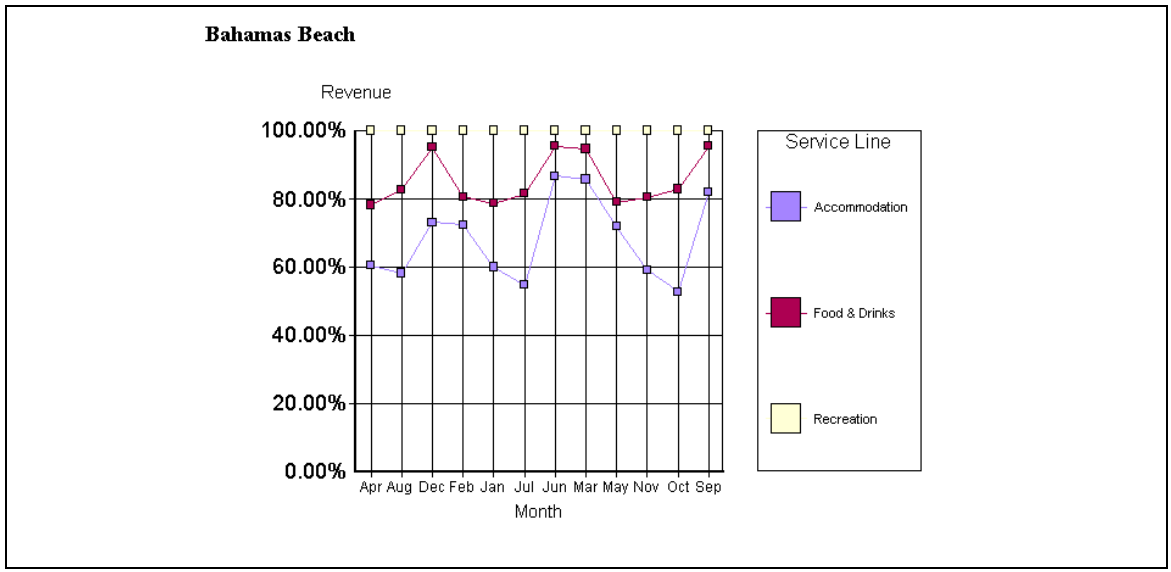
Keep in mind

You can use more than one measure object for the Y-axis as long as the objects are of the same type and scale, such as Number of Guests and Future Guests.

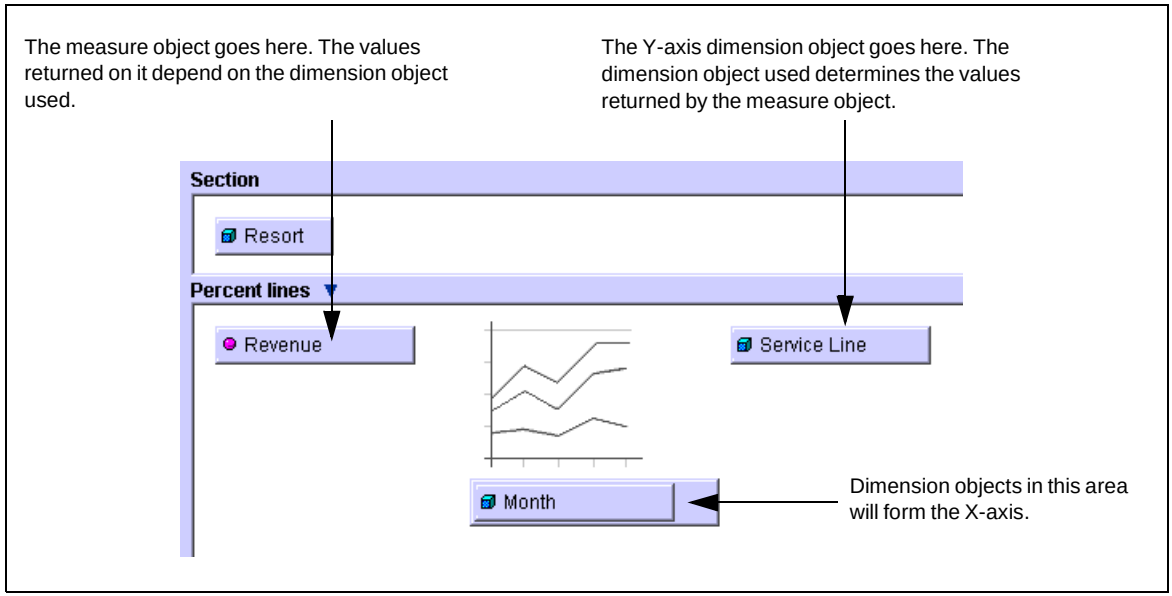
Stacked line chart tips

- You can give the chart a 3D look.
- You can flip the horizontal and vertical axes.
- For best results, don't load up the X-axis with numerous dimension objects.

Percent Line Charts



Percent Line Chart



Arrangement of Objects used to Create the Percent Line Chart

Description

A percent line chart is similar to a stacked line chart, except that it shows percentages of the whole, while a stacked line chart shows proportions of the total.

In the example, Service Line forms the X-axis data and Service is included as a sub-group. The result is a chart which shows what percentages the different services (Activities, Bungalow, Excursion, etc.) contribute to the entire revenue for the Accommodation, Food & Drinks, and Recreation service lines.

Suitable for

Showing what percentage each group contributes to the total.

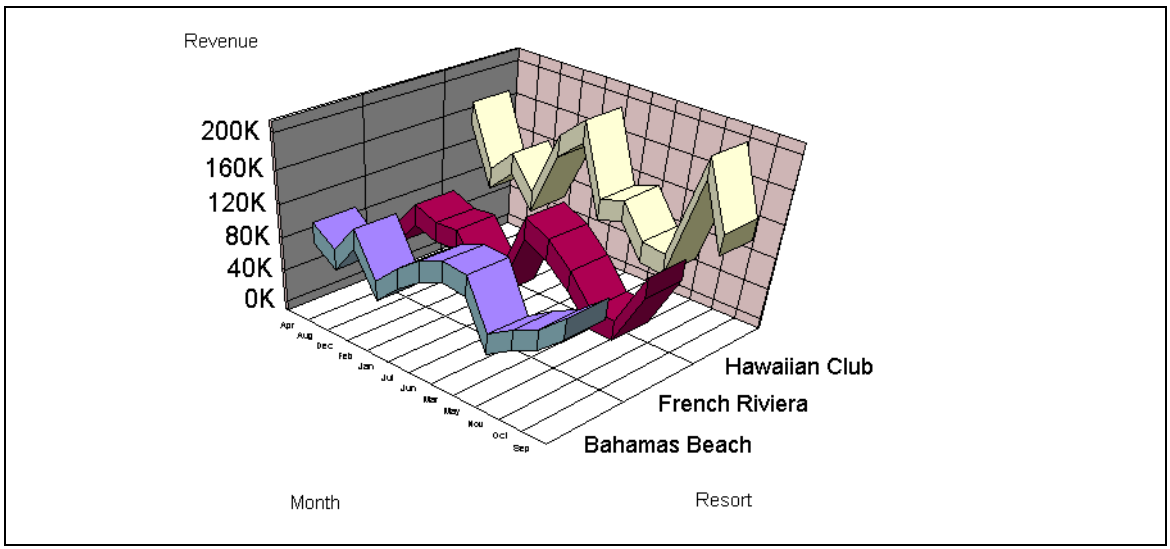
Keep in mind

You can use more than one measure object for the Y-axis as long as the objects are of the same type and scale, such as Number of Guests and Future Guests.

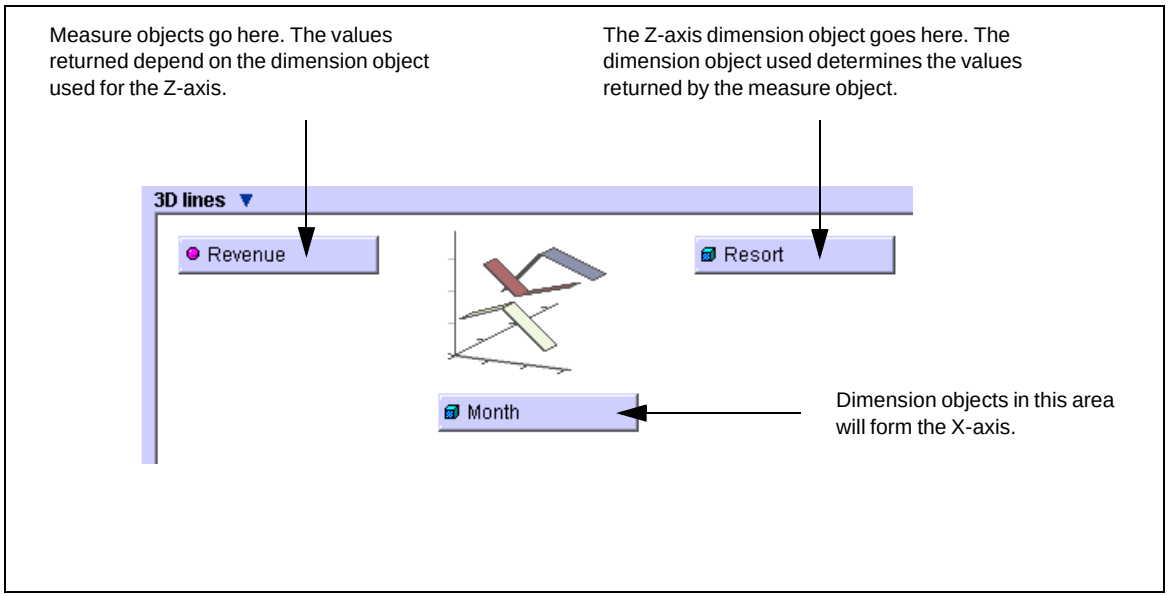
Percent line chart tips

- You can give the chart a 3D look.
- You can flip the horizontal and vertical axes.
- For best results, don't load up the X-axis with numerous dimension objects.

3D Line Charts



3D Line Chart



Arrangement of Objects used to Create the 3D Line Chart

Description

A 3D Line chart lets you view plotted lines from a 3D perspective.

Suitable for

Providing a 3D look to your line chart. A 3D Line chart is particularly useful for comparing and viewing trends.

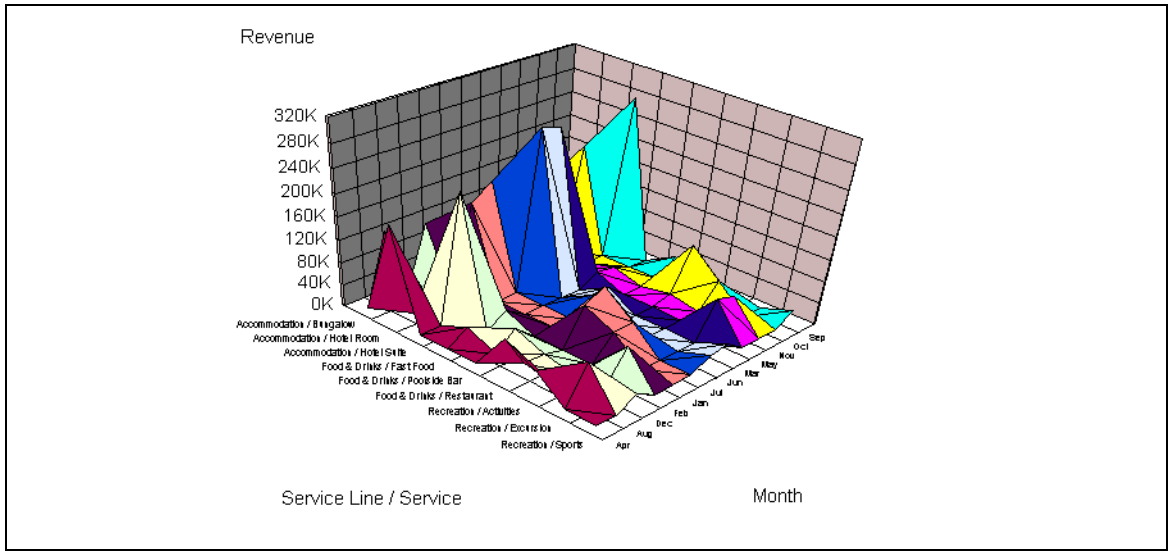
Keep in mind

You can use more than one measure object for the Y-axis as long as the objects are of the same type and scale, such as Number of Guests and Future Guests.

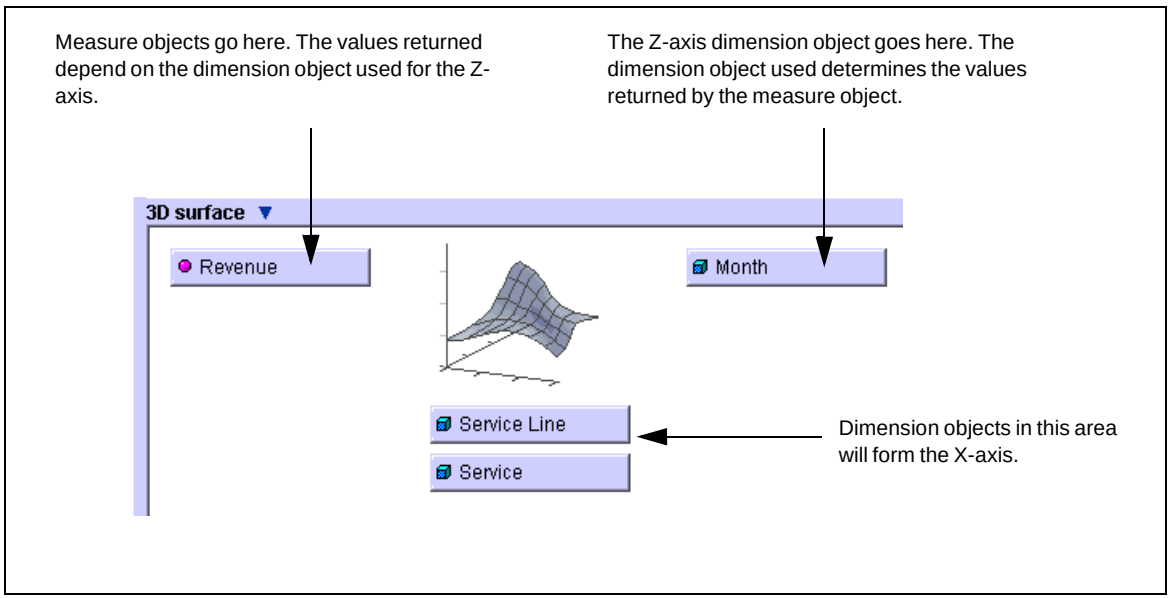
3D line chart tips

- You can flip the horizontal and vertical axes.
- For best results, don't load up the X-axis with numerous dimension objects.

3D Surface Charts



3D Surface Chart



Arrangement of Objects used to Create the 3D Surface Chart

Description

A 3 dimensional chart which displays data plotted over a surface area.

Suitable for

Comparing two groups of data combinations.

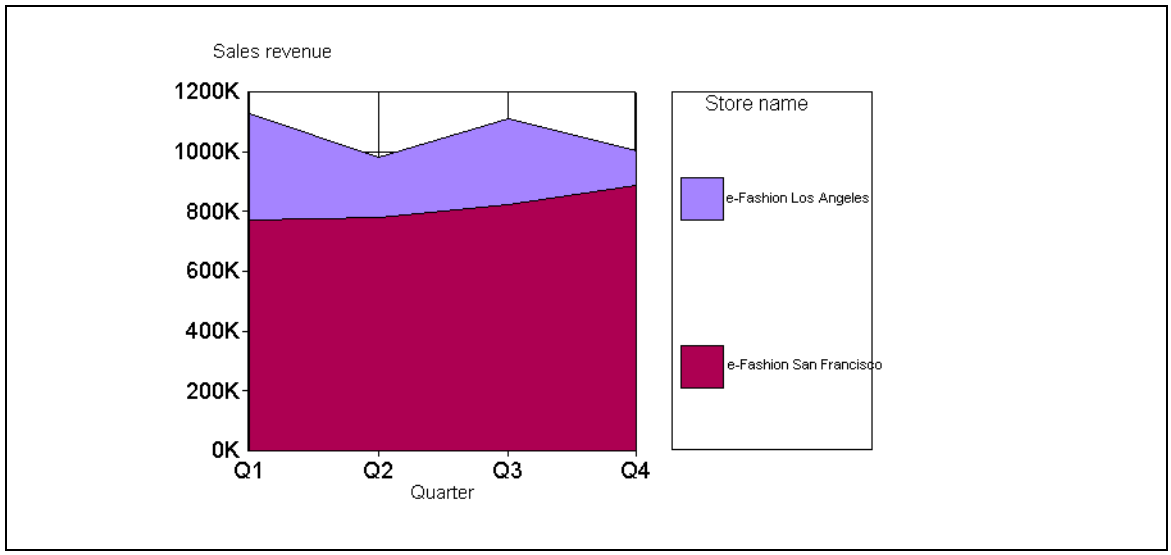
Keep in mind

You can use more than one measure object for the Y-axis as long as the objects are of the same type and scale, such as Number of Guests and Future Guests.

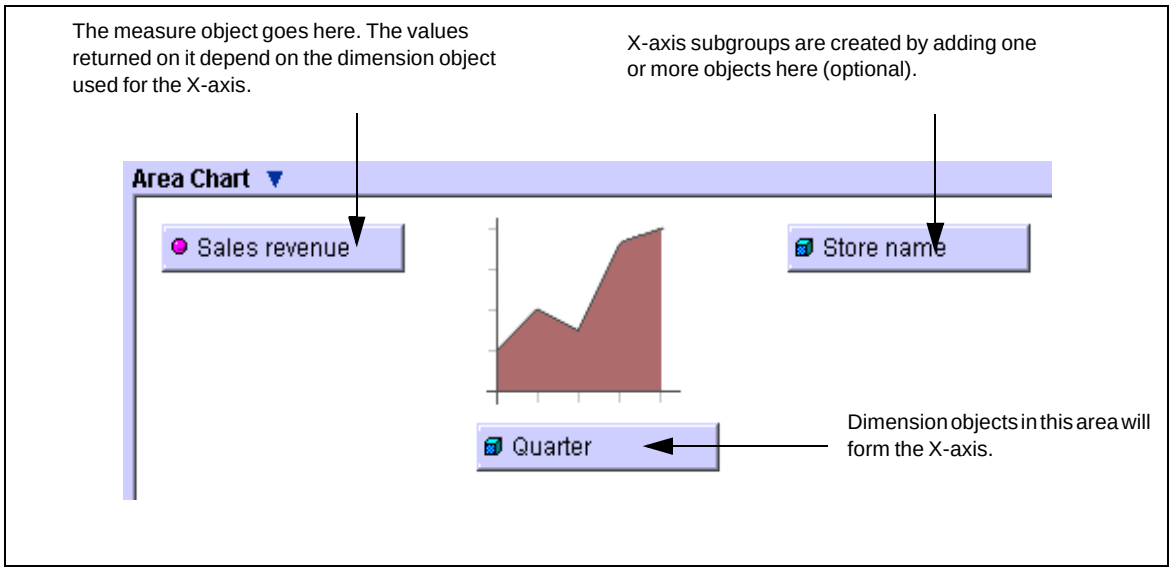
3D surface chart tips

- You can flip the horizontal and vertical axes.
- For best results, don't load up the X-axis with numerous dimension objects.

Area Charts



Area Chart



Arrangement of Objects used to Create the Area Chart

Description

An area chart is the same as a line chart -- but the area between the lines and axis is filled in.

Suitable for

This chart is useful when you want to emphasize the size of the total data, not the changes in the data. You may not want to use an area chart if you have sharp contrasts in the data points.

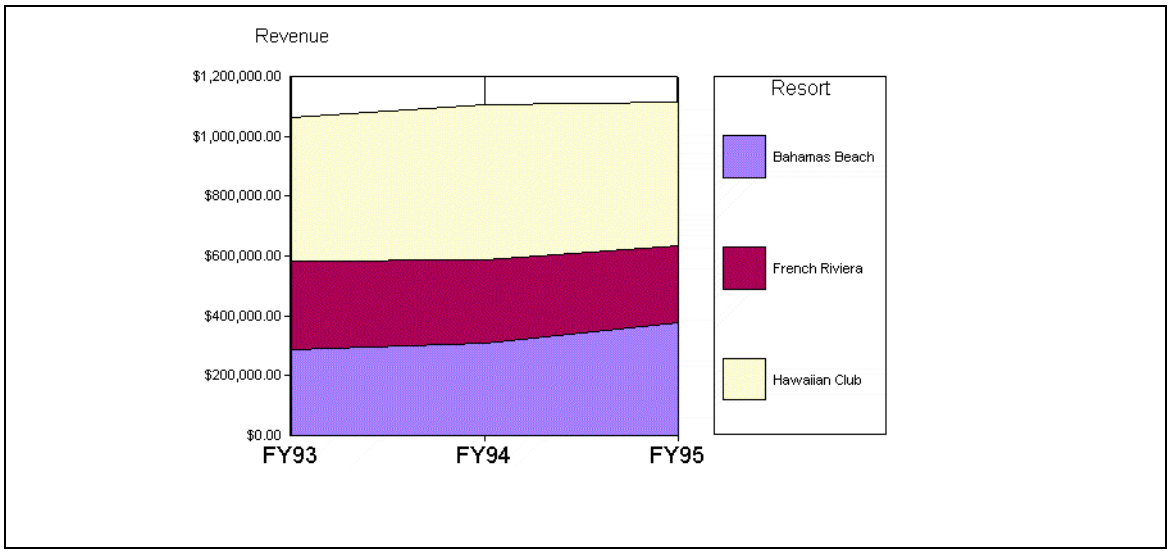
Keep in mind

You can use more than one measure object for the Y-axis as long as the objects are of the same type and scale, such as Number of Guests and Future Guests.

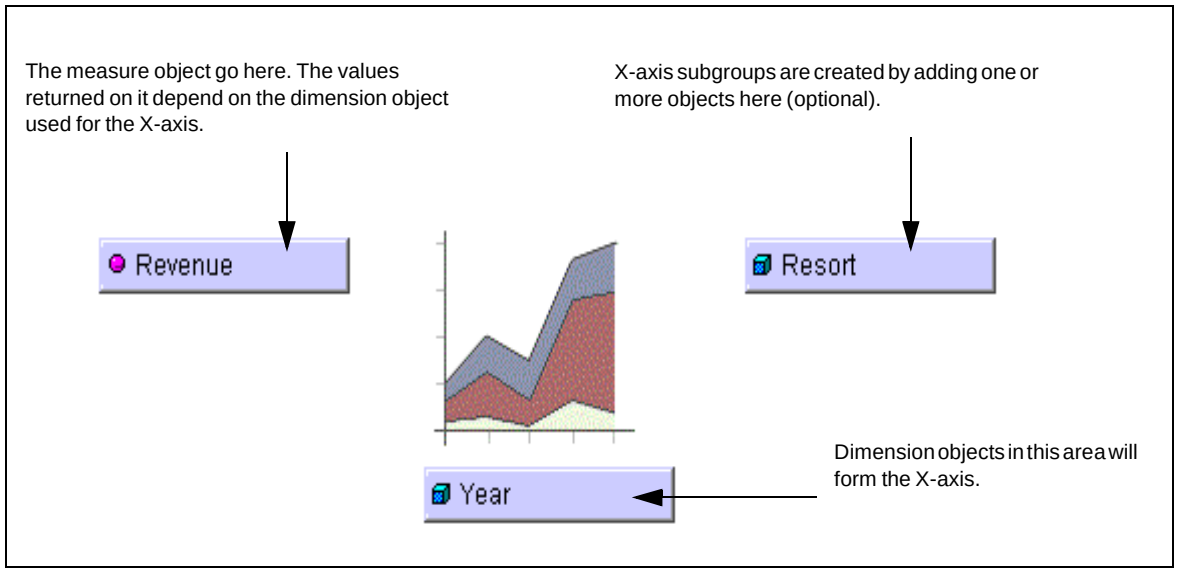
Area chart tips

- You can give the chart a 3D look.
- You can flip the horizontal and vertical axes.
- For best results, don't load up the X-axis with numerous dimension objects.

Stacked Area Charts



Stacked Area Chart



Arrangement of Objects used to Create the Stacked Area Chart

Description

A stacked area chart shows related data groups, one on top of the other.

In the example, Resort forms the X-axis data and Year is included as a sub-group. The result is a chart which shows how each resort has contributed to the total revenue for each year.

Suitable for

Use a stacked area when you have several related groups of data and you want to show how each group contributes to the total.

Keep in mind

You can use more than one measure object for the Y-axis as long as the objects are of the same type and scale, such as Number of Guests and Future Guests.

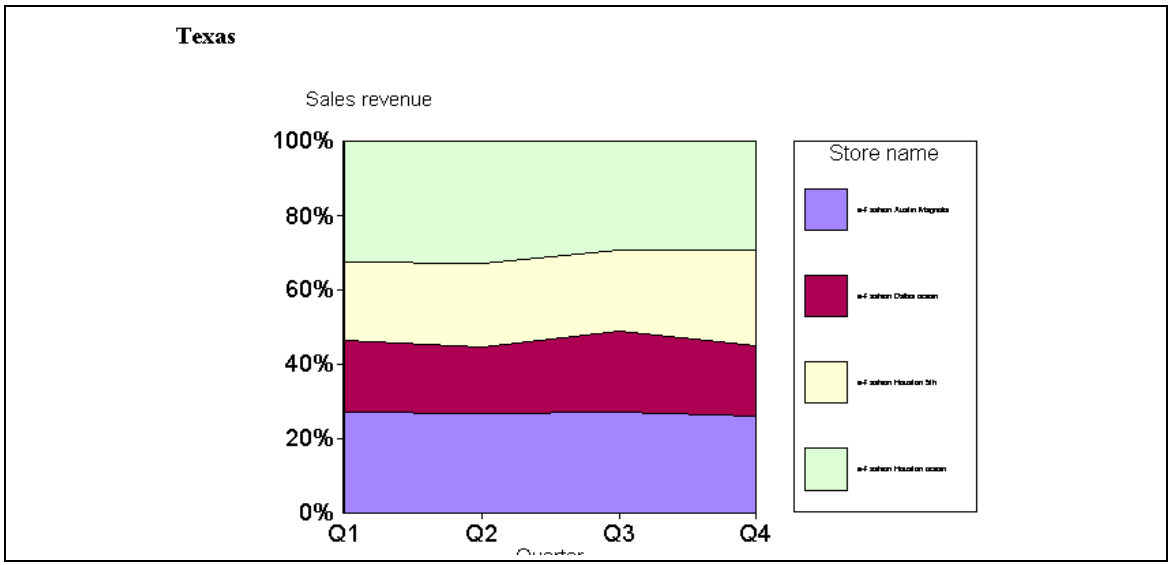
Stacked Area chart tips

- You can give the chart a 3D look.
- You can flip the horizontal and vertical axes.
- For best results, don't load up the X-axis with numerous dimension objects.

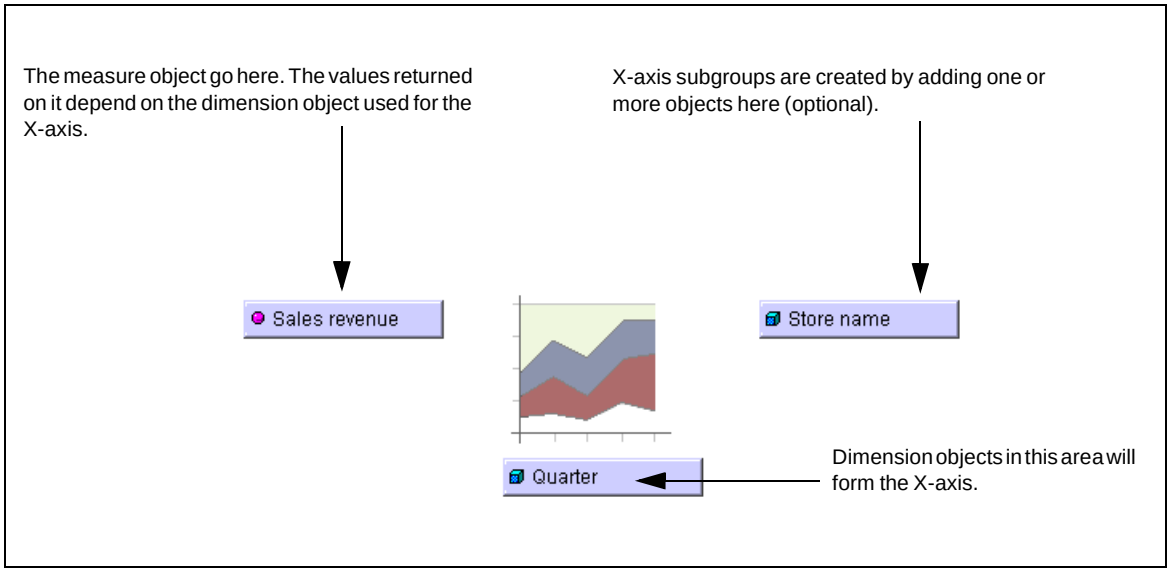
Keep in mind

You can use more than one measure object for the Y-axis as long as the objects are of the same type and scale, such as Number of Guests and Future Guests.

Percent Area Charts



Percent Area Chart



Arrangement of Objects used to Create the Stacked Area Chart

Description

A percent area chart is similar to a stacked area chart, except that it shows percentages of the whole, while a stacked area chart shows proportions of the total.

In the example, Quarter forms the X-axis data and Store name is included as a sub-group. The result is a chart which shows how each store has contributed to the total revenue for each quarter.

Suitable for

Showing what percentage each group contributes to the total.

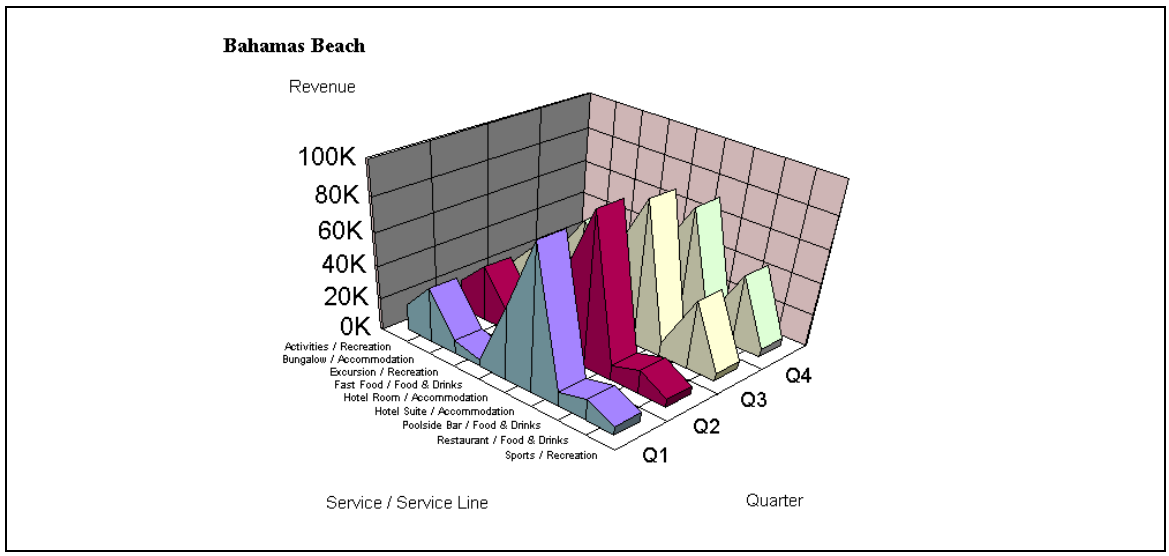
Keep in mind

If you place objects in the subgroup area, you can only use one measure object in the bar chart.

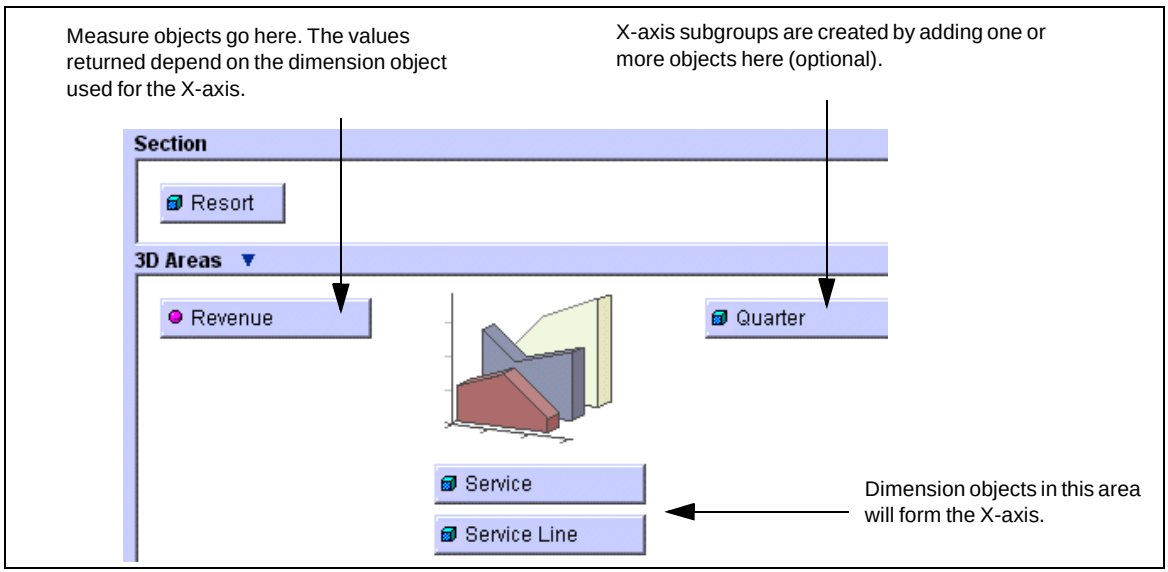
Percent area chart tips

- You can give the chart a 3D look.
- You can flip the horizontal and vertical axes.
- For best results, don't load up the X-axis with numerous dimension objects.

3D Area Charts



3D Area Chart



Arrangement of Objects used to Create the 3D Area Chart

Description

A 3D area chart lets you view the data side-by-side.

Suitable for

Comparing the magnitude of the different sets of data. For example, you could compare the four sales quarters and see at a glance if the sales in each quarter are similar in magnitude.

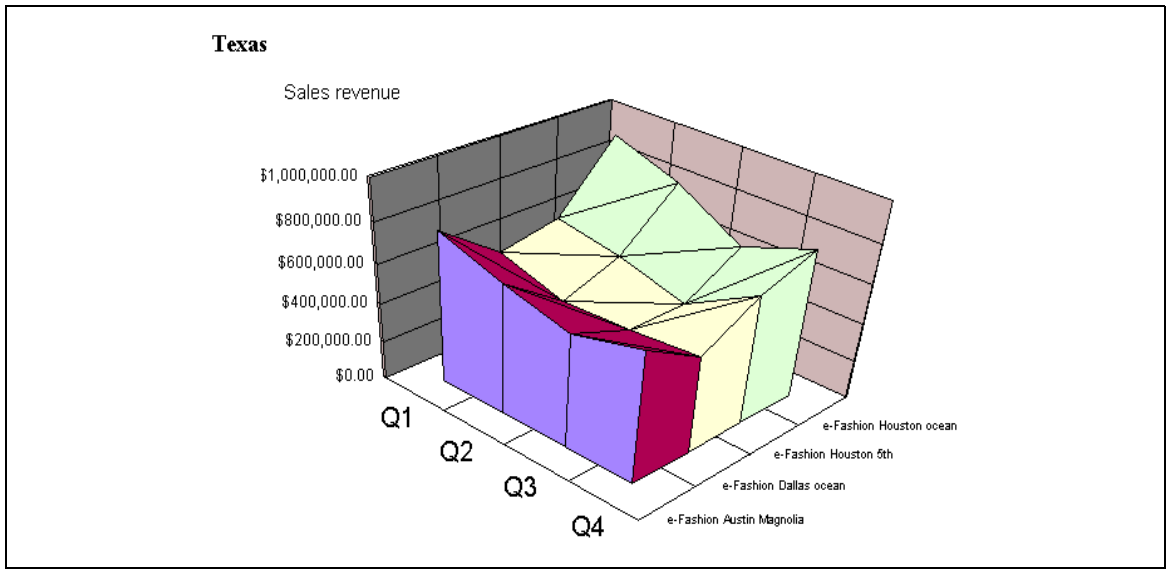
Keep in mind

You can use more than one measure object for the Y-axis as long as the objects are of the same type and scale, such as Number of Guests and Future Guests.

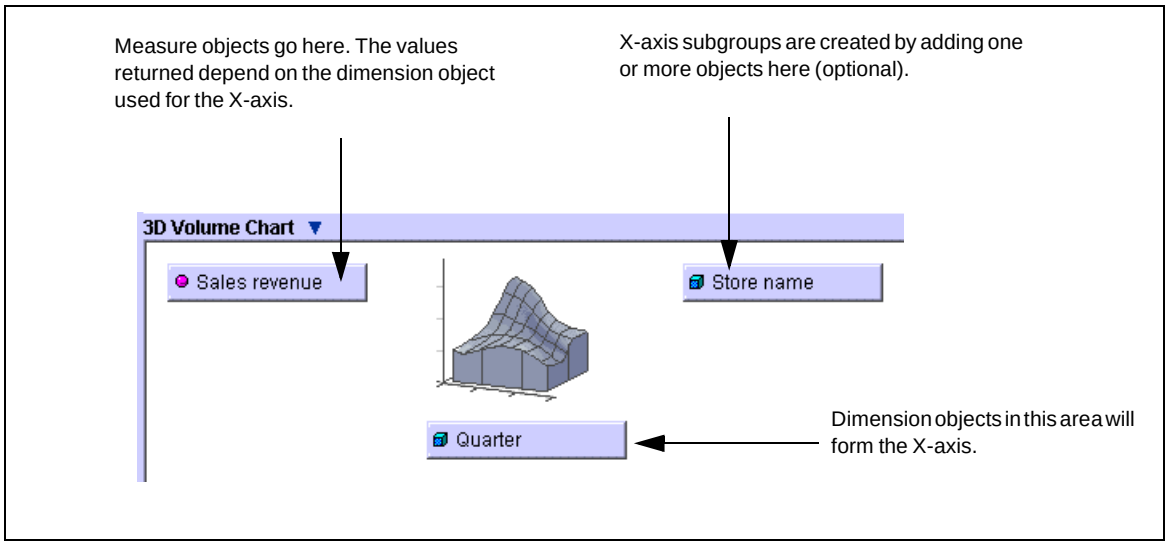
3D area chart tips

- You can flip the horizontal and vertical axes.
- For best results, don't load up the X-axis with numerous dimension objects.

3D Volume Charts



3D Volume Chart



Arrangement of Objects used to Create the 3D Volume Chart

Description

A 3D volume chart shows trends in values across two dimensions in a continuous curve.

Suitable for

Comparing trends within a set of data. For example, the chart above compares the sales revenue of four stores over four quarters.

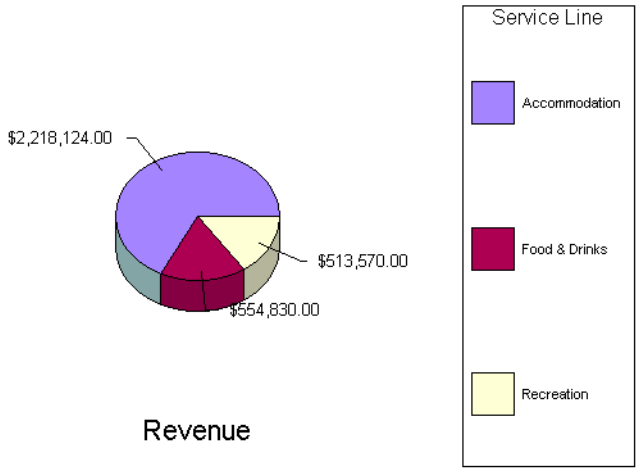
Keep in mind

You can use more than one measure object for the Y-axis as long as the objects are of the same type and scale, such as Number of Guests and Future Guests.

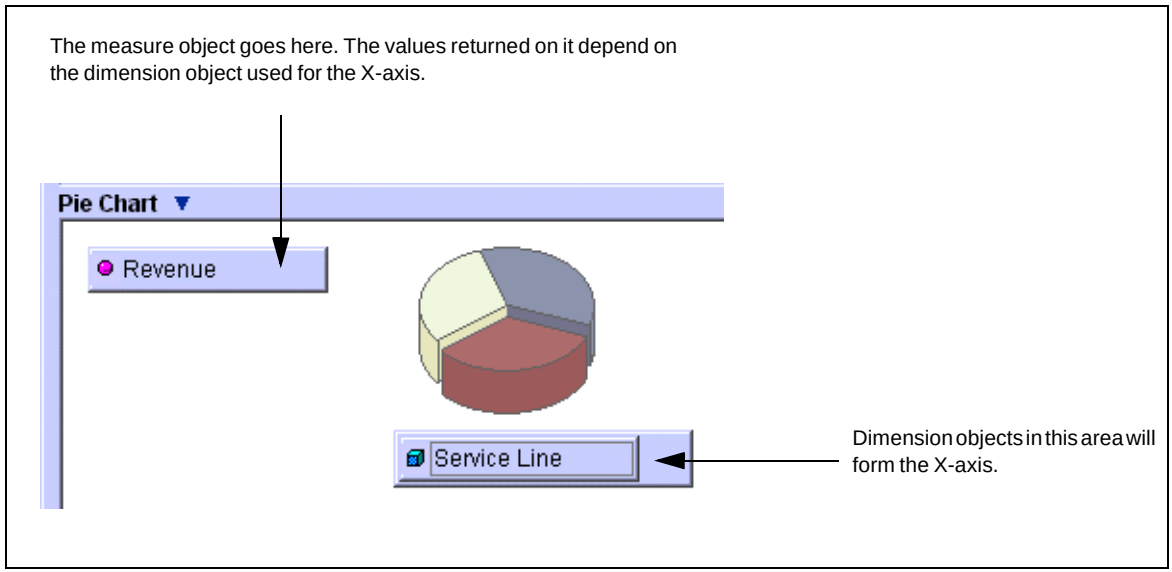
3D volume chart tips

- You can flip the horizontal and vertical axes.
- For best results, don't load up the X-axis with numerous dimension objects.

Pie Charts



Arrangement of Objects used to Create the Pie Chart



Arrangement of Objects used to Create the Pie Chart

Description

The data determines the size of each pie segment.

Suitable for

Showing the relationship of the parts to the whole.

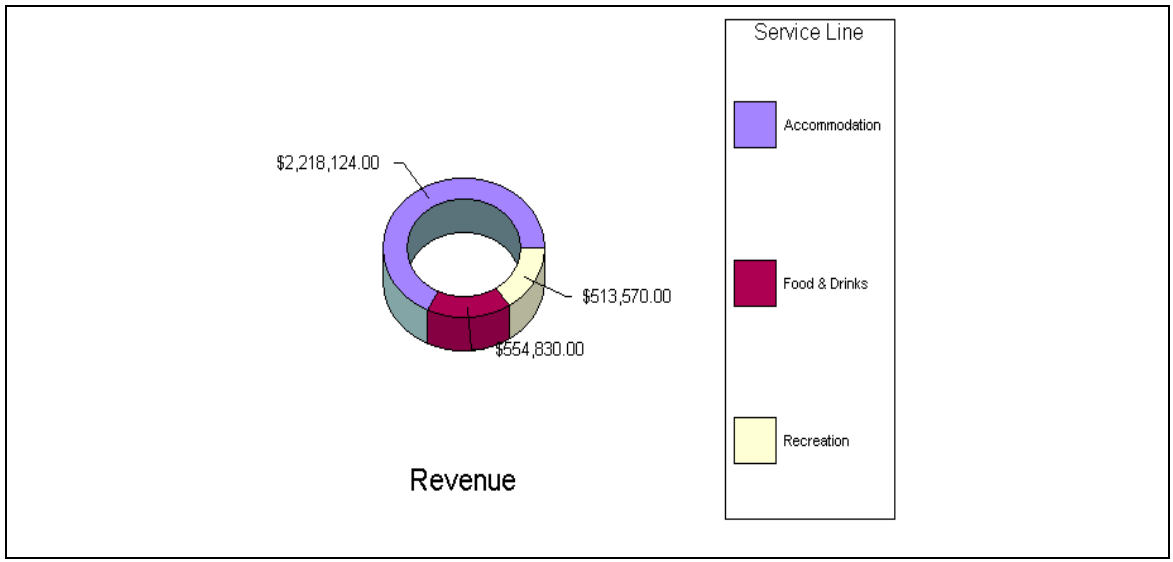
Keep in mind

You can only use one measure object in the query. If you need to use two or more measure objects, choose a different type of chart, such as a bar chart or 3D bar chart.

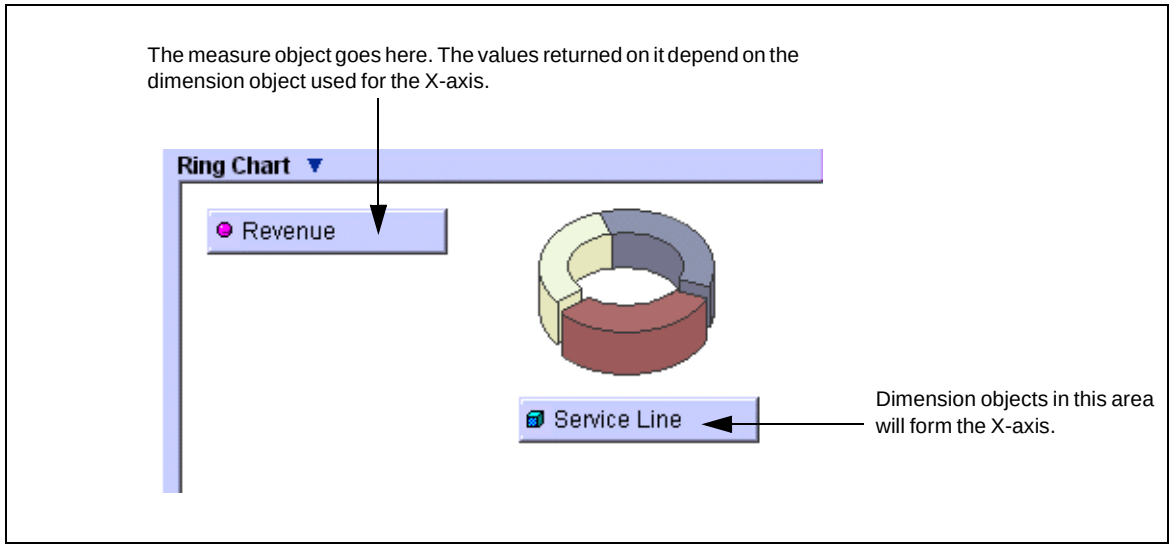
Pie chart tips

- For best results, don't load up the X-axis with numerous dimension objects.

Doughnut Charts



A Doughnut Chart



Arrangement of Objects used to Create the Doughnut Chart

Description

A Doughnut chart is similar to a Pie chart.

Suitable for

Showing how proportions of data contribute to the whole.

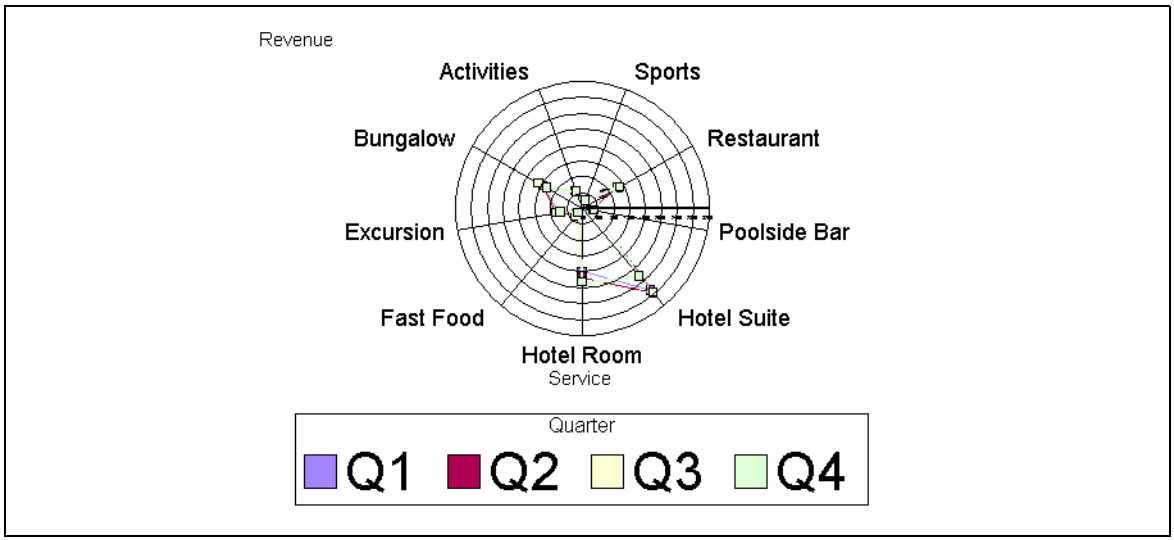
Keep in mind

You can only use one measure object in the query. If you need to use two or more measure objects, choose a different type of chart, such as a bar chart or 3D bar chart.

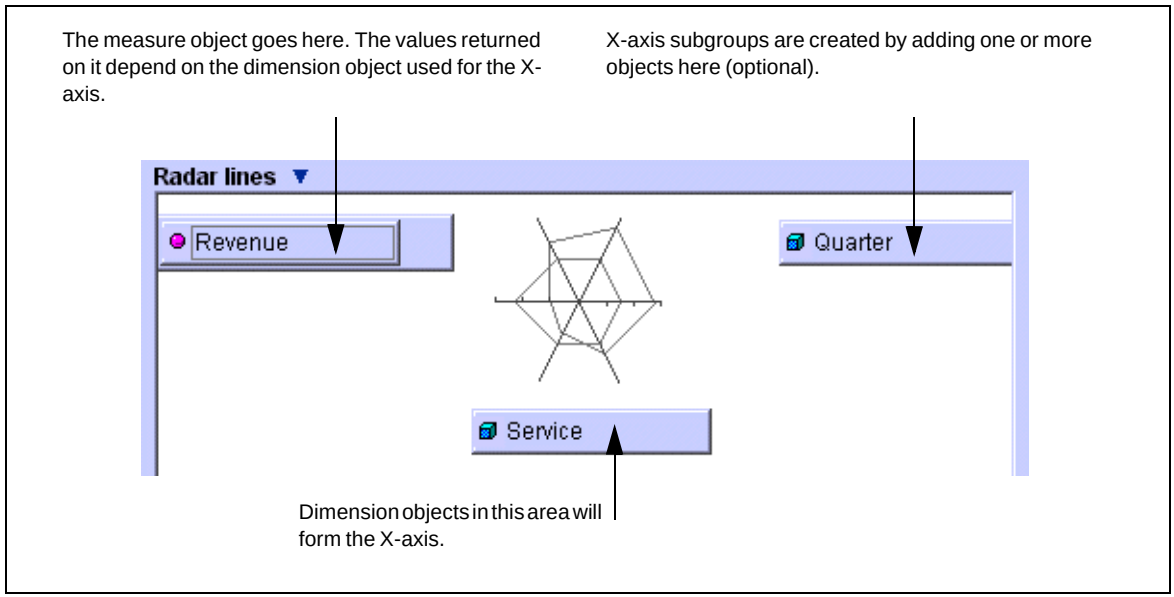
Doughnut chart tips

- For best results, don't load up the X-axis with numerous dimension objects.

Radar Line Charts



Radar Line Chart



Arrangement of Objects used to Create the Radar Line Chart

Description

The X and Y axis connect at the chart's center. Data points for each set of data are connected by a line.

Suitable for

Making comparisons between series of data.

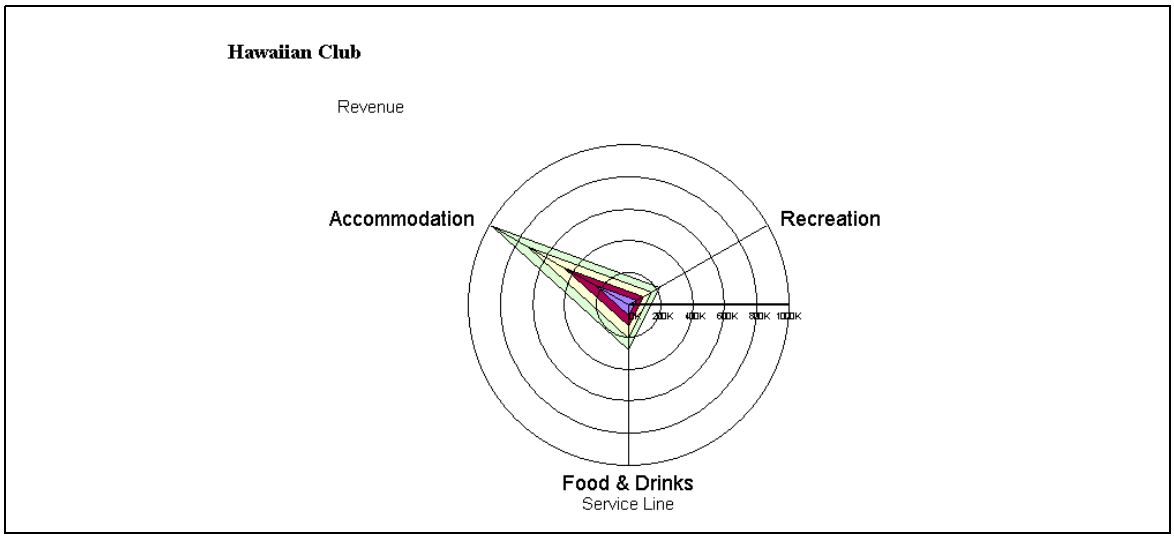
Keep in mind

You can only use one measure object in the query.

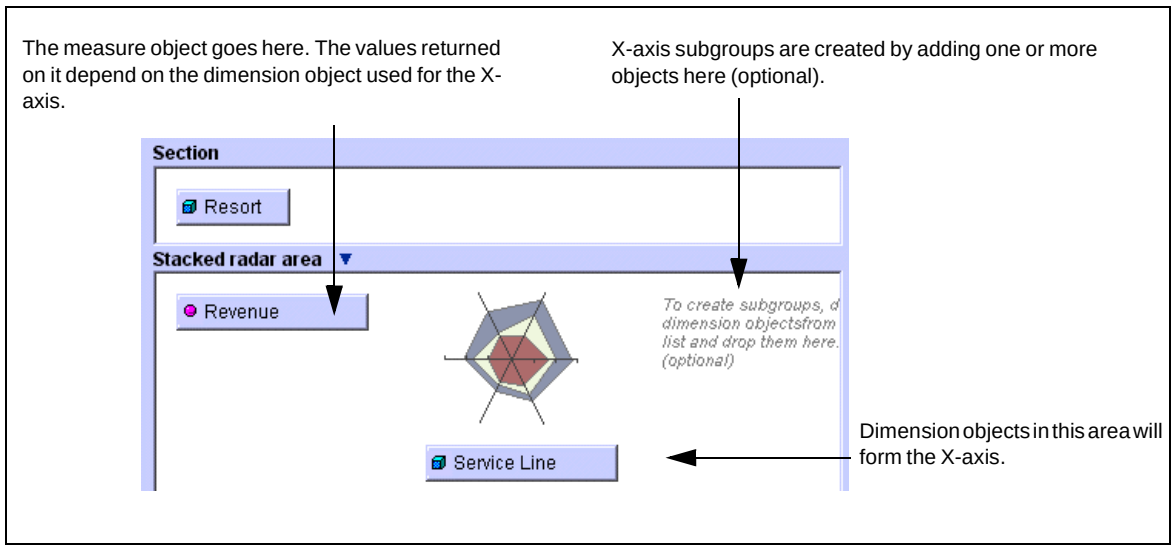
Radar line chart tips

For best results, don't load up the X-axis with numerous dimension objects.

Stacked Radar Area Charts



Stacked Radar Area Chart



Arrangement of Objects used to Create the Stacked Radar Area Chart

Description

The X and Y axis connect at the chart's center. The data series are represented as a stacked area graph.

Suitable for

Making comparisons between series of data.

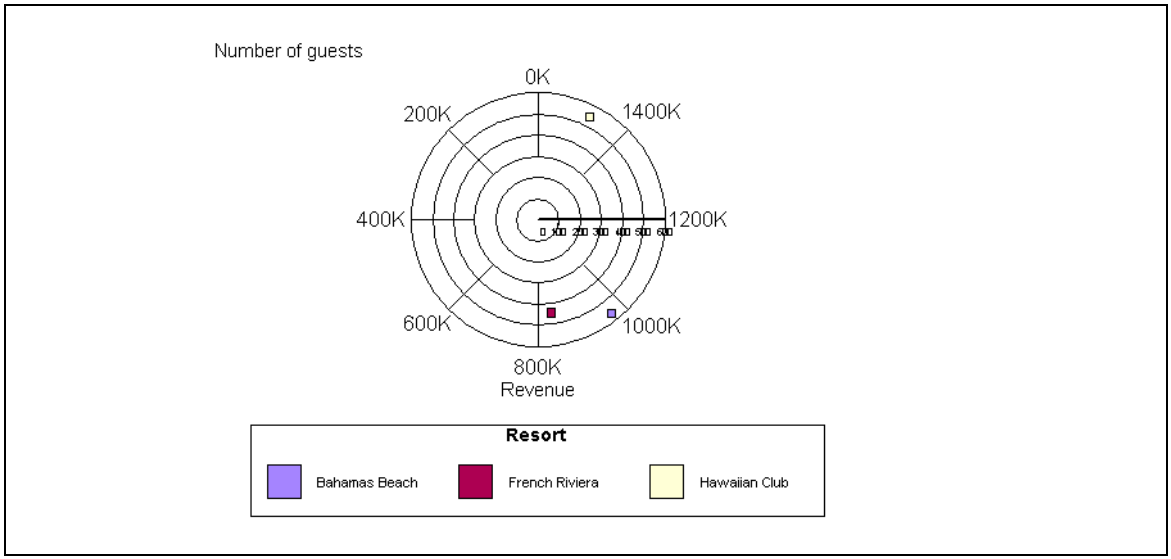
Keep in mind

You can only use one measure object in the query.

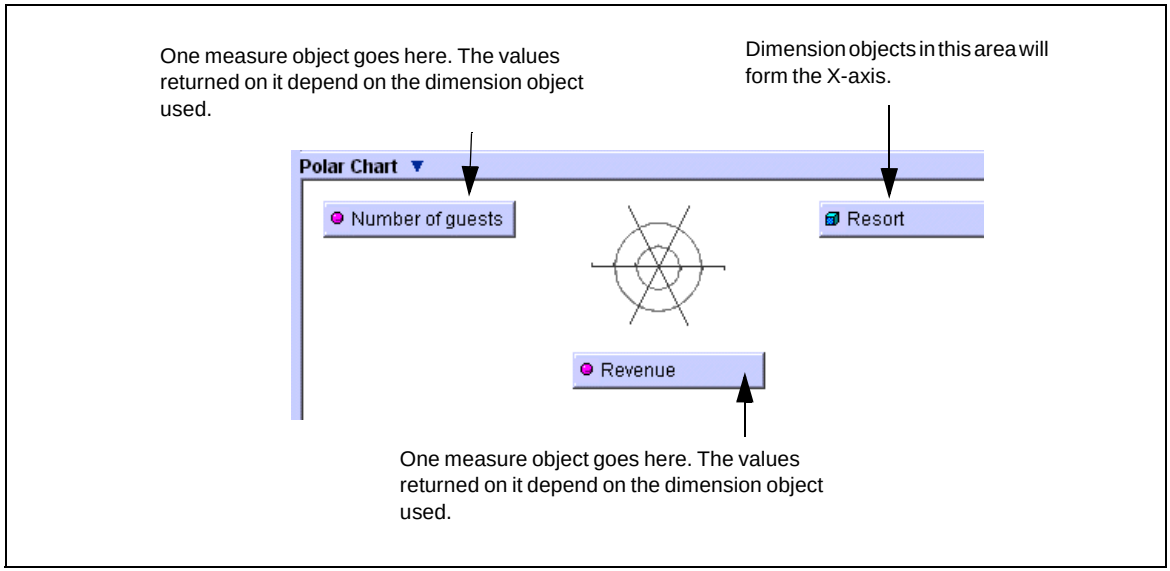
Radar area chart tips

For best results, don't load up the X-axis with numerous dimension objects.

Polar Charts



Polar Chart



Arrangement of Objects used to Create the Polar Chart

Description

A circular graph that lets you plot polar coordinates.

Polar Charts are Suitable for

Plotting polar coordinates.

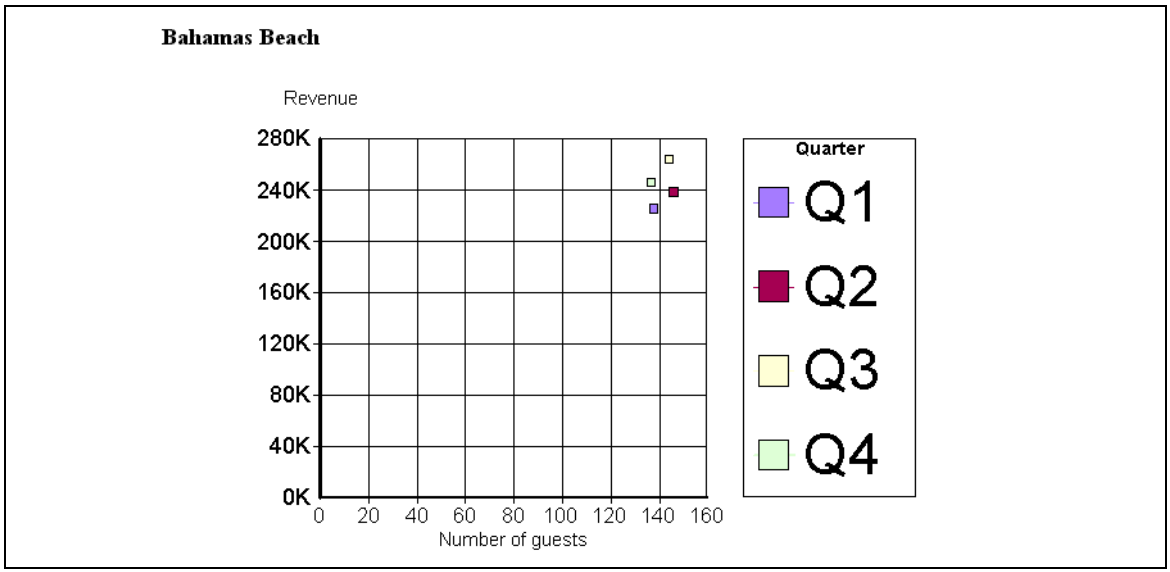
Keep in mind

You need two measure objects for a polar chart.

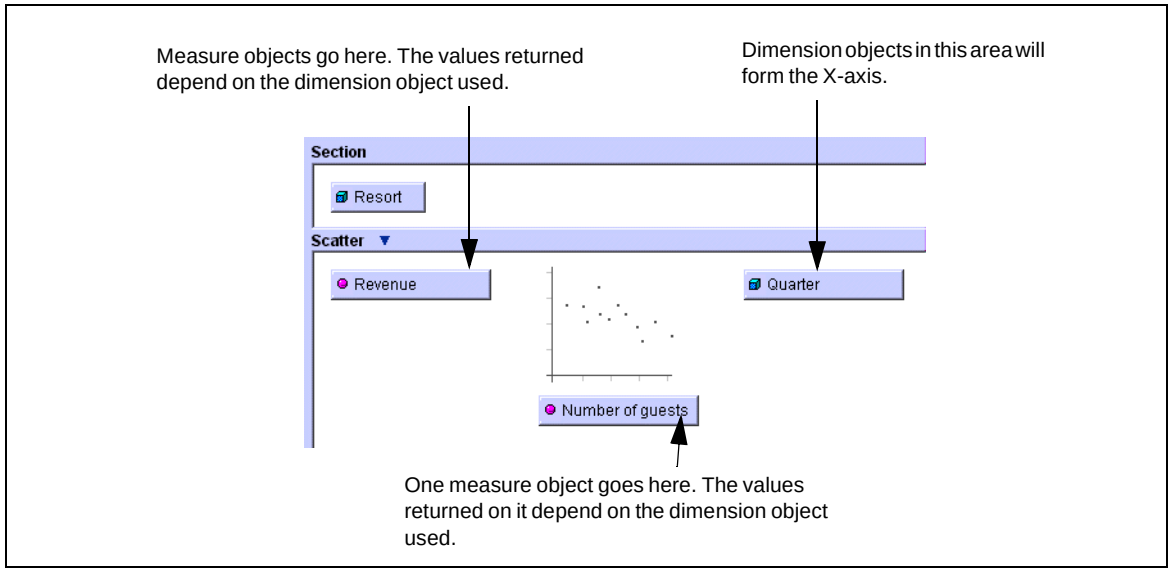
Polar chart tips

For best results, don't load up the X-axis with numerous dimension objects.

Simple Scatter Charts



Scatter Chart



Arrangement of Objects used to Create the Scatter Chart

Description

A scatter chart is similar to a line graph. The data points are plotted without a connecting line drawn between them.

Scatter Charts are Suitable for

Showing how data points compare to each other.

Keep in mind

- You need at least two measure objects for the query (one for the X-axis and one for the Y-axis).
- You can use more than one measure object for the Y-axis as long as the objects are of the same type and scale, such as Number of Guests and Future Guests.

Scatter chart tips

For best results, don't load up the X-axis with numerous dimension objects.

Chapter 5 Working with Document Data

In this chapter

Overview

You may want to restrict the amount of data displayed in a document, or perform calculations on data. These options help you to analyze data by allowing you to look at it from different viewpoints.

With WEBINTELLIGENCE you can:

- Use predefined or user-defined conditions to restrict the type of data retrieved from the database.
- Include prompts with the document, so that the reader can pre-select a condition value.
- Make calculations on the document data and include them as part of the document table or chart.

Defining Conditions and Filters

Note: Although you add conditions and filters to a document in the same way, there are differences in how they restrict document data. See "Understanding the Difference Between Filters and Conditions" on page 130.

You may decide that you don't want to include all the data in a document. Applying conditions or filters to queries allows you to include only the data you need.

The following illustrations show how a condition or filter works.

You can apply a condition to Country by selecting one of its values: US.

Country	Quarter	Revenue
FRANCE	Q1	$208,565.00
FRANCE	Q2	$242,165.00
FRANCE	Q3	$226,125.00
FRANCE	Q4	$158,565.00
US	Q1	$582,051.00
US	Q2	$579,652.00
US	Q3	$658,572.00
US	Q4	$630,829.00

Only the data for that value is now displayed.

Country	Quarter	Revenue
US	Q1	$582,051.00
US	Q2	$579,652.00
US	Q3	$658,572.00
US	Q4	$630,829.00

A condition or filter can also affect calculations. For example, the total number of guests for all resorts changes when you apply a condition to the Resort object.

For more information about using conditions, see:

- "Applying Conditions or Filters to an Object" on page 131
- "Deleting a Condition" on page 138
- "Combining Conditions" on page 138

Understanding the Difference Between Filters and Conditions

The Conditions tab is divided into two sections: Query Conditions and Document Filters.

Note: If you don't see both of these sections when you open the Conditions tab in the ActiveX Web Panel, double-click the section header that's visible. The other appears immediately.
Once they're both visible, you can collapse and expand either of these sections simply by double-clicking it.

The major difference between query conditions and document filters is that a condition is applied to the query and limits the data retrieved from the database, whereas the filter is applied to the data in the document to hide information and display only the information that you want to appear.

Example **Using a condition**

You are building a query containing the following objects:

- Resort
- Service Line
- Revenue

Additionally, you apply the pre-defined *condition* Hawaiian resort, and you run the query.

The result is a table containing the data for the revenue for all the service lines for the Hawaiian resort, only. No data for any other resort has been retrieved form the database.

Now you want to send the document to another user, but that user does not have user rights to query the database. The recipient will only be able to edit the information you have retrieved from the database. They will not be able to drill on the document to access more detailed data or drill up to view the sales figures for the other resorts in the database.

Example **Using a filter**

You have received a document from another user, but your access rights don't allow you to query the database. You are then restricted to working with the data that was originally retrieved from the database.

The document you received displays the prompts for Resort, Service Line, and Quarter. You want to view the revenue for accommodation only, so you scroll through the Service Line prompt list and select Accommodation. A new table is displayed in the document. It shows the revenue that accommodation generated for the Hawaiian resort.

If you return to the Conditions tab in the Web panel, you would see that a filter for the Service Line was automatically added. Data for the other service lines has been filtered out, but it is still stored as part of the document.

Applying Conditions or Filters to an Object

You can apply two different types of conditions or filters to a query object:

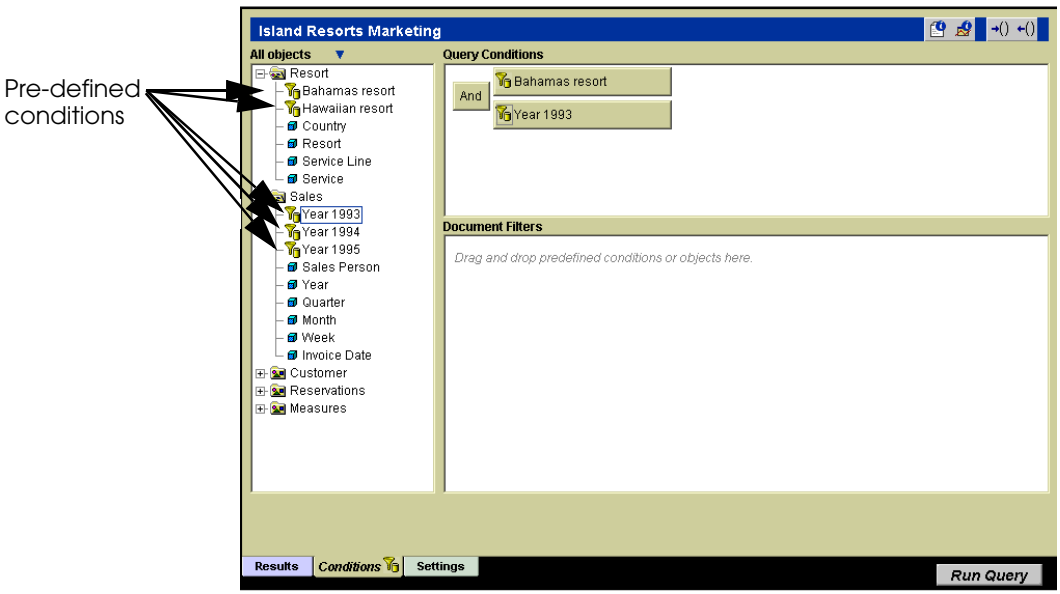
- Predefined
- User-defined

Applying pre-defined conditions

Pre-defined conditions provide an easy way to distribute customized capabilities that might be necessary for your data needs, without forcing users to learn how to create conditions on their own or to enter complex data sets. This type of condition is defined by the BUSINESSOBJECTS designer who created the universe.

- For example, your universe lets users make inquiries about revenues for a chain of holiday resorts. Sales figures can be grouped by year. To make it easier to restrict revenue information to specific years, you might use a predefined condition that filters out all but a particular set of annual results.

You can find pre-defined condition objects by clicking the Conditions tab and looking in the Classes and Objects panel.



Note that condition objects use the same icon as the Condition button in the Results tab toolbar.

To add a pre-defined condition to your document:

1. If necessary, click Edit to return to the Web Panel.
2. Click the Conditions tab to open the Conditions panel.
3. Drag the condition you want to use from the Classes and Objects panel into the Query Conditions panel, or simply double-click the condition.

   The condition takes effect the next time you run the query.

The effect of the condition depends on the functionality built into the object. These should be documented by the object designers in your organization.

Applying user-defined conditions and filters

User-defined conditions and filters let you set up your own custom conditions to use in your document. They perform the same function as predefined conditions, but they also let you personalize the final document results.

For example, you may want to generate a document containing information about customers from a specific country, instead of all the customers in the database.

You create user-defined conditions on the Conditions tab in the Web Panel. Each condition is named after the object to which you're applying the condition. There are two other possible parts to the condition:

- An operator, which specifies *how* WEBINTELLIGENCE should test the data.
- An operand, which specifies what value(s) the data should be tested against.

The following table contains the available condition operators and specifies the type of operand each operator requires:

Condition	Operator	Operand
Equal To	Are equal to	A single alphanumeric or string value
Different From	Are different from	A single alphanumeric or string value
Greater Than	Are greater than	A single alphanumeric or string value
Greater Than Or Equal To	Are greater than or equal to	A single alphanumeric or string value
Less Than	Are less than	A single alphanumeric or string value
Less Than Or Equal To	Are less than or equal to	A single alphanumeric or string value
Between	Are between	Two alphanumeric or string values; this includes the parameters—that is, WEBINTELLIGENCE considers the parameters themselves to be between the two parameters
Not Between	Are not between	Two alphanumeric or string values; this excludes the parameters—that is, WEBINTELLIGENCE considers the parameters themselves to be between the two parameters and doesn't return values containing the parameters if present

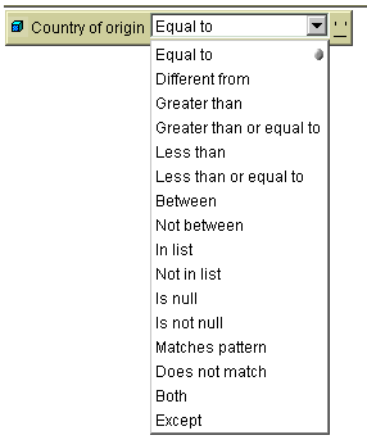
Condition	Operator	Operand
In List	Are in a list consisting of	One or more alphanumeric or string values
Not In List	Are not in a list consisting of	Two or more alphanumeric or string values
Is Null	Are null	No parameters
Is Not Null	Are not null	No parameters
Matches Pattern	Contain a pattern specified by	A single alphanumeric or string value
Does Not Match	Do not contain a pattern specified by	A single alphanumeric or string value
Both	Are both	Two alphanumeric or string values
Except	Are any value but	A single alphanumeric or string value

To add a user-defined condition to an object:

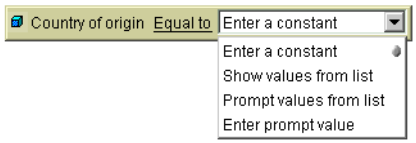
1. You can apply a condition to an object by doing either of the following:
   - Drag the object from the Classes and Objects panel into the Block panel. With the object still selected, click the Condition button in the toolbar. The Web Panel takes you to the Conditions tab automatically.
   - Go to the Conditions tab of the Web Panel. Drag the object to which you want to apply the condition into the Conditions tab.

Note: When at least one condition has been added to the Conditions tab, the Condition icon appears in the actual Conditions tab, as well as the object.

- Select the condition's operator from the list in the middle of the object.



2. Specify any required operands by clicking on the far right side of the condition and keeping the mouse button pressed until another list drops down.



3. Select one of the following from the list:

- Enter a constant

  Displays an entry box in which you can type the operand value you want to be used in the condition.

Note: If no data in the database corresponds to this value, you receive the message "No data to fetch." When you click OK, the operand entry box reappears. Enter a valid value then click OK.

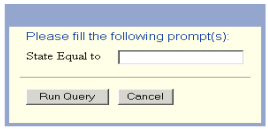
- Show list of values
  Queries the database and returns a list of values from which you can select one or more values. The number of values you can select depends on the operator you defined for the condition.

For example, if the “Equal to” operator is specified, only one operand value can be selected.

- Prompt list of values
  Lets you create a user prompt for the selection of an operand from a list of pre-defined values.
  When you select this option, an entry box appears containing the data object’s name. This will be the operand prompt’s *label.* The default label is the recommended setting.
  When you run the query, or whenever a user tries to refresh the document, a dialog box will appear prompting the selection of a value from a pre-defined list for this condition.

  An operand must be selected from the list before the query can be run or the document refreshed.

- Enter a prompt.
  Lets you create a user prompt for the definition of a new operand value.
  When you click this option, an entry box appears containing the data object’s name. This will be the operand prompt’s *label*. The default label is the recommended setting.
  When you run the query, or whenever a user tries to refresh the document, a dialog box appears prompting the entry of an operand value.



  A value must be entered before the query can be run or the document refreshed.

Note: If no data in the database corresponds to this operand, you receive the message “No data to fetch.” When you click OK, the operand entry box reappears. Enter a valid operand then click OK.

Once you've added all your data objects and conditions, you can run the query by clicking the Run Query button. This returns the generated document containing query results.

For information on formatting your document, see page 149

Deleting a Condition

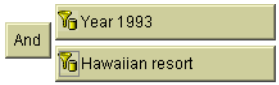
There are several ways to delete an applied condition from either the Section / Detail panels in the Results tab, or the Conditions panel from the Conditions tab:

- If you're using the Full Java applet version of the Web Panel or the ActiveX Web Panel, you can delete the conditions object in two ways: You can either select the condition object then press the Del key on your keyboard, or drag the condition object back to the Classes and Objects panel.
- If you're using the Light Java applet version of the Web Panel, you can drag the condition object back to the Classes and Objects panel.

Combining Conditions

You can combine conditions to increase your control over the data a document contains. Combining conditions lets you retrieve data that, for example, contains the strings Smith *or* Johnson, or concerns customers from the United States with an income between $50,000 and $100,000.

Whenever you have more than one condition in a document, WEBINTELLIGENCE automatically combines them with an "And". All you actually have to do to combine conditions is add them to your query objects.



Once combined, however, you can determine how the conditions work together by bracketing them together and changing the logical operators that specify how the conditions are combined.

Logical operators

Logical operators let you specify how you want conditions combined. This allows you to create a set of conditions, for example, that returns all items whose total sales were greater than $10,000 *and* were sold to customers in France.

WEBINTELLIGENCE conditions allow only two types of logical operators:

- The And logical operator combines two conditions into a narrower condition. A data item must meet the first condition and the second condition to meet the condition's requirements.
- The Or logical operator combines two conditions into a broader condition. A data item can meet the first condition *or* the second condition to meet the condition's requirements.

To switch between the And operator and the Or operator, double-click the operator object on the Conditions tab.

Note: When you change an operator, all the operators in the same indentation level change as well. For information about indenting conditions, see the following section.

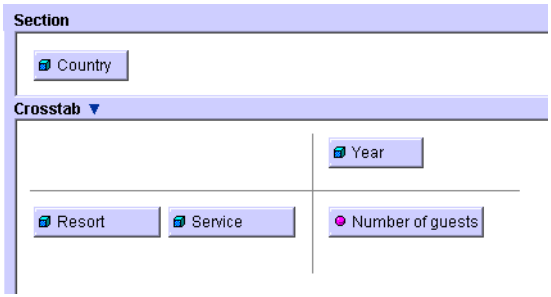
Bracketing conditions

If you've combined at least three conditions in your query, you can *bracket* certain conditions to bind them together. You use this the same way you might use parentheses to change the value *a* in the following arithmetic equations:

***a*= 36 * (6 +12)** as opposed to ***a* = (36 * 6) + 12**

For example, you want information about the service preferences of American clients at the Bahamas Beach and the Hawaiian Club resorts in 1995.

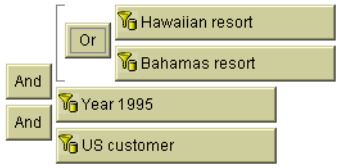
Your query looks like this:



You have dropped the following conditions in the Conditions tab:

You want data for either the Hawaiian resort or the Bahamas resorts, from 1995 for American customers. To obtain that data, you now need to define the required operators and indent certain conditions to order the conditions hierarchically:

(Hawaiian OR Bahamas) AND 1995 AND American customers:



You can use as many brackets on the Conditions tab as your conditions allow. To bracket query conditions:

1. In the Web Panel's Condition tab, make sure at least three conditions have been added.

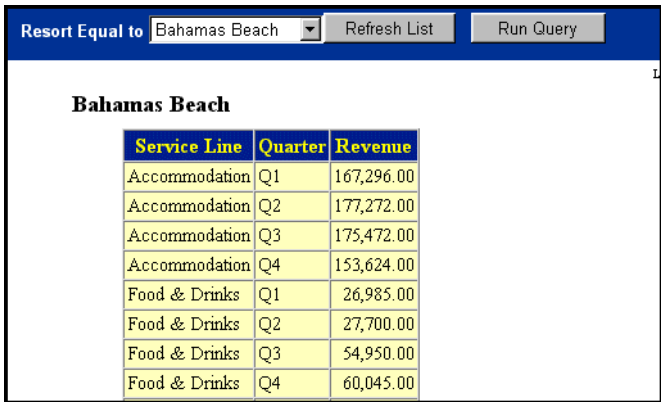
2. Click the And or Or operator joining the two conditions you want to bracket, then click the Shift Right button in the toolbar. WEBINTELLIGENCE indents the conditions to the right and puts an open bracket around them.

3. To undo a bracket, simply click the Shift Left button in the toolbar.

Displaying Prompts

If you want the prompt value that conditioned the information in the document to be displayed automatically when the document is opened, check the Show Prompts within the report option in the Document Settings tab.

Here's an example of a result:



This makes it possible for you to select a different value directly from the Document Results page.

To modify a prompt value:

1. Click the down arrow next to the prompt.
2. Select the new prompt value from the list.
3. Click Refresh List to update the list of values.
4. Select a value from the list.
5. Click Run Query. WebIntelligence runs a new query and the updated document opens in the Document Results page.

Making Calculations on Document Data

WEBINTELLIGENCE includes standard functions (sum, count, average, minimum, maximum and percentage) that enable you to make quick calculations on the data in documents. For example, in a document that displays revenue per resort per country, you can calculate and display the total revenue for all resorts per country.

You can perform a number of calculations on data, including:

- Total sum of a row or column
- Number of items returned
- Average value of the items returned
- Minimum value returned
- Maximum value returned
- Percentage

This section presents a number of ways to add calculations to your documents, including:

- Adding a calculation
- Specifying Calculation Functions
- Formatting the Results of a Calculation

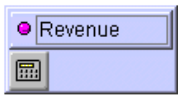
Adding a calculation

You can apply a calculation to an object in a document in two ways:

- Drag the Calculation button from the toolbar to the object in the Block panel.
- Select the object then click the Calculation button in the toolbar.

Note: You cannot make calculations on objects in the Section panel of the Web Panel.

A Calculation icon appears attached to the object.



If you attached the calculation to a numerical data object, it will by default return the sum of the object values in the generated document. If the object is non-numerical, such as Customer, Service Line or Resort, the calculation will return the number of values returned for the object.

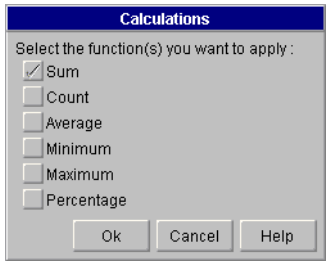
If you want to make a different calculation, or add additional functions to the calculation, see the following section.

Specifying Calculation Functions

Once you've attached a calculation to an object in a query, you need to define what kind of numerical operation it will make on the object.

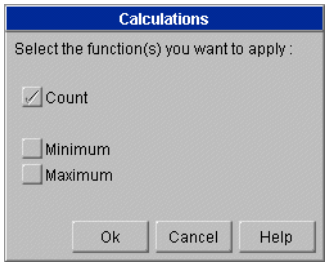
The list of calculation functions from which you can choose depends on the type of object to which you're applying the calculation:

Calculation Functions for Numerical Values



This dialog box contains functions appropriate for a numerical object such as Revenue. The Sum function is checked by default.

Calculation Functions for Non-numerical Values



The choice of functions for an object such as Resort include only:

- Count
  In this case, the number of values returned is totaled. For example, the number of resorts.

Note: The Count function always returns the number of distinct values in a list. For example, if the Bahamas Beach resort occurs multiple times in a list of resorts, it is counted once only.

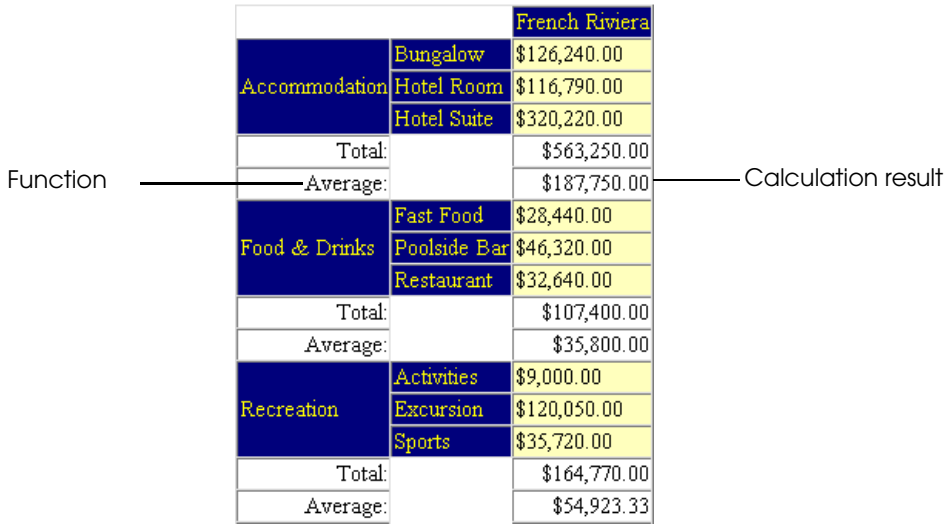
- Minimum
  For non-numerical data, the minimum value is determined alphabetically.
- Maximum
  For non-numerical data, the maximum value is determined alphabetically.

The Count function is checked by default.

To define the type of calculation:

1. Double-click the object's Calculation icon. The Calculations window opens.
2. Check the function or functions you want to use.
3. When you're done, click OK.

In the generated document, the results of these calculations, labelled to indicate what kind of function was used, appear beneath the object's value(s).



		French Riviera
Accommodation	Bungalow	$126,240.00
	Hotel Room	$116,790.00
	Hotel Suite	$320,220.00
Total:		$563,250.00
Average:		$187,750.00
Food & Drinks	Fast Food	$28,440.00
	Poolside Bar	$46,320.00
	Restaurant	$32,640.00
Total:		$107,400.00
Average:		$35,800.00
Recreation	Activities	$9,000.00
	Excursion	$120,050.00
	Sports	$35,720.00
Total:		$164,770.00
Average:		$54,923.33

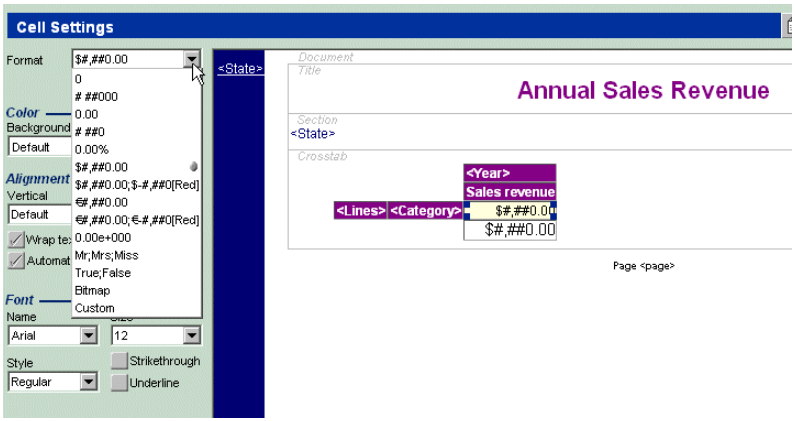
Formatting the Results of a Calculation

You can change the format of the results of your calculation. For example, you might want to apply percentage or Euro currency formats.

To define the format:

1. Click Edit in the toolbar and choose the Settings tab.
2. Select the cell with the calculation you want to format.

   The Cell Settings format menu appears.
3. Click the arrow on the Format drop down menu to see the list of format options.



4. Select the format you want and click the Apply Format button to apply the new format to your document.

Removing a Calculation

To remove a calculation from an object, do one of the following:

- If you're using a Java Web Panel, select the Calculation icon attached to the object, then press the Del key on your keyboard.
- If you're using the ActiveX Web Panel, right-click the Calculation icon. Choose Calculations from the contextual menu, then choose None from the second contextual menu that opens.

Chapter 6 Formatting Documents

In this chapter

Sorting Data

You use sorts to control the order in which document data appears. You can apply a sort to any object.

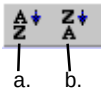
Sorts control whether data appears in *ascending*, or in *descending* order in the generated document. The following table summarizes the meaning of each of these orders for each type of data:

	Toolbar Button	Text	Numbers	Dates
Ascending order		A-Z	lowest to highest	past to present
Descending order		Z-A	highest to lowest	present to past

The default order of appearance of all types of data is ascending.

Applying a Sort to an Object

To apply a sort, use the sort buttons on the Web Panel toolbar.



a. Ascending sort
b. Descending sort

With the document definition open in the Web Panel, drag the appropriate toolbar sort button to the object representing the data you want to sort. The image of the toolbar button is added to the object.

In the above sort, resort names will be listed in alphabetical order in the generated document.

Removing a Sort from an Object

You can easily remove a sort from an object:

- In the Java Web Panel, select the Sort icon attached to the object then press the Del key on your keyboard.
- In the ActiveX Web Panel, right-click the object. A contextual menu opens. Click Sort. Another menu opens. Click None.
- In either Web Panel, drag the condition icon out of the Section/Block panel.

Breaking a Document into Parts

Tables and crosstabs display the values returned by objects in a single block.

For example, the following simple table displays revenue per resort per quarter in a solid block, repeating the name of the resort for each quarter's revenue.

Simple table without breaks

Resort	Service Line	Revenue
Bahamas Beach	Accommodation	673,664.00
Bahamas Beach	Food & Drinks	169,680.00
Bahamas Beach	Recreation	128,100.00
French Riviera	Accommodation	563,250.00
French Riviera	Food & Drinks	107,400.00
French Riviera	Recreation	164,770.00
Hawaiian Club	Accommodation	981,210.00
Hawaiian Club	Food & Drinks	277,750.00
Hawaiian Club	Recreation	220,700.00

You can make a document much more readable by breaking it up into parts. To do this, just apply a break to the Detail object you want to trigger the break.

Example **Creating a new block for data concerning each resort**

For example, if you apply a break to the Resort object in the table above, you get the following result:

Resort	Service Line	Revenue
Bahamas Beach	Accommodation	673,664.00
	Food & Drinks	169,680.00
	Recreation	128,100.00
Resort	**Service Line**	**Revenue**
French Riviera	Accommodation	563,250.00
	Food & Drinks	107,400.00
	Recreation	164,770.00
Resort	**Service Line**	**Revenue**
Hawaiian Club	Accommodation	981,210.00
	Food & Drinks	277,750.00
	Recreation	220,700.00

This breaks the data for each resort into separate blocks.

Applying a Break

To apply a break, drag the Break button from the Web Panel toolbar to the object you want to apply the break to.

Note: You cannot apply a break to an object in the Section panel.

A Break icon now appears attached to the object in the Block panel.

If you apply more than one break in a document, each Break icon in the Block panel displays a number (the first break is number 1, the second 2, and so forth).

By default, a break inserts:

- A header consisting of row or column titles at the beginning of each created table or crosstab block
- A blank row or column at the end of each table or crosstab.

If you want the break to behave differently, see the following section.

Defining Break Attributes

Once you've inserted a break, you can define a variety of settings for it. For some settings, the result differs depending on whether you're formatting a table or crosstab document.

- Break Header inserts row and/or column headers for each table or crosstab block created by the break. It is checked by default. If only this attribute is checked the result looks like this:

Break Header option's action on table

Resort	Quarter	Revenue
Bahamas Beach	Q1	$67,085.00
Bahamas Beach	Q2	$75,600.00
Bahamas Beach	Q3	$78,788.00
Bahamas Beach	Q4	$66,456.00
Resort	Quarter	Revenue
French Riviera	Q1	$76,270.00
French Riviera	Q2	$85,560.00
French Riviera	Q3	$81,085.00
French Riviera	Q4	$53,025.00
Resort	Quarter	Revenue
Hawaiian Club	Q1	$113,505.00
Hawaiian Club	Q2	$111,330.00
Hawaiian Club	Q3	$129,120.00
Hawaiian Club	Q4	$125,730.00

Break Header option's action on crosstab

	Bahamas Beach		French Riviera		Hawaiian Club
Q1	$67,085.00	Q1	$76,270.00	Q1	$113,505.00
Q2	$75,600.00	Q2	$85,560.00	Q2	$111,330.00
Q3	$78,788.00	Q3	$81,085.00	Q3	$129,120.00
Q4	$66,456.00	Q4	$53,025.00	Q4	$125,730.00

- Break Footer inserts a blank row or column at the end of each table or crosstab block created by the break. It is checked by default. If only this attribute is checked, the result looks like this:

Break Footer option's action on table blocks

Resort	Quarter	Revenue
Bahamas Beach	Q1	$67,085.00
Bahamas Beach	Q2	$75,600.00
Bahamas Beach	Q3	$78,788.00
Bahamas Beach	Q4	$66,456.00
French Riviera	Q1	$76,270.00
French Riviera	Q2	$85,560.00
French Riviera	Q3	$81,085.00
French Riviera	Q4	$53,025.00
Hawaiian Club	Q1	$113,505.00
Hawaiian Club	Q2	$111,330.00
Hawaiian Club	Q3	$129,120.00
Hawaiian Club	Q4	$125,730.00

Break Footer option's action on crosstab blocks

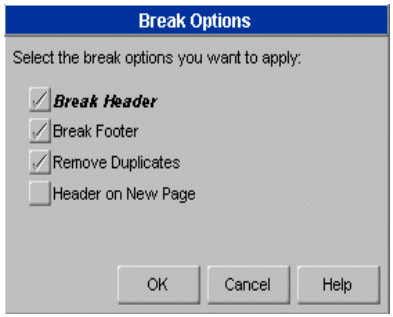
	Bahamas Beach	French Riviera	Hawaiian Club
Q1	$67,085.00	$76,270.00	$113,505.00
Q2	$75,600.00	$85,560.00	$111,330.00
Q3	$78,788.00	$81,085.00	$129,120.00
Q4	$66,456.00	$53,025.00	$125,730.00

- Remove Duplicates removes all duplicate values from the data you apply the break to, so that each value is only shown once. This attribute is checked by default.
- If the table or crosstab extends over more than one page, check Header on New Page if you want the break header to be repeated on each new page.

How you define a break's attributes differs depending on the type of Web Panel you're using.

Defining break attributes in the Java Web Panel

1. Double-click the Break icon attached to the object in the Section/Block panel. The Break Options dialog opens.



2. Check the option(s) you want to apply to the break, then click OK.

Defining break attributes in the ActiveX Web Panel

1. Right-click the Break icon attached to the object. A contextual menu opens.
2. Choose Break. A menu of Break options opens.
3. Check the option(s) you want to apply to the break, then click OK.

Removing a Break

To remove a break:

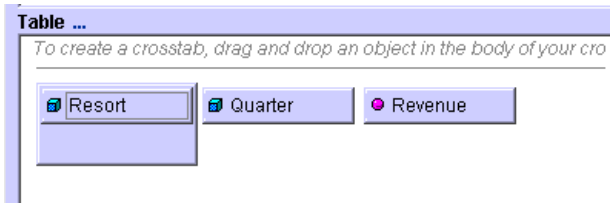
- If you're using the Java Web Panel, select the Break icon attached to the object and press the Del key on your keyboard.
- If you're using the ActiveX Web Panel, right-click the Break icon attached to the object.
  Choose Break from the contextual menu. A menu of Break options opens.
  Choose None.
- In either Web Panel, drag the break out of the Section/Block panel.

Creating Sections within a Document

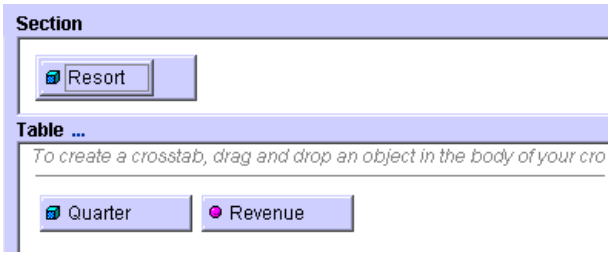
Breaking a document into sections is a way of spitting large blocks of data into smaller, more comprehensible parts. Each section contains at least one block, and at least one section cell, as illustrated below.

To create a section, just insert an object into the Section panel in the Web Panel.

Query for a simple Block table



Same objects reorganized into Sections and Blocks



The following figures show the results of both of the above queries.

Resulting Table document

Resort	Quarter	Revenue
Bahamas Beach	Q1	67,085.00
Bahamas Beach	Q2	76,270.00
Bahamas Beach	Q3	113,505.00
Bahamas Beach	Q4	113,505.00
French Riviera	Q1	75,600.00
French Riviera	Q2	85,560.00
French Riviera	Q3	111,330.00
French Riviera	Q4	78,788.00
Hawaiian Club	Q1	81,085.00
Hawaiian Club	Q2	129,120.00
Hawaiian Club	Q3	66,456.00
Hawaiian Club	Q4	125,730.00

Resulting Section/Block document

Bahamas Beach

Quarter	Revenue
Q1	224,881.00
Q2	237,872.00
Q3	263,422.00
Q4	245,269.00

French Riviera

Quarter	Revenue
Q1	208,565.00
Q2	242,165.00
Q3	226,125.00
Q4	158,565.00

Hawaiian Club

Quarter	Revenue
Q1	357,170.00
Q2	341,780.00

In the Section/Block document above:

- A separate section is created for each value in the Quarter section.
- One section value appears in a cell inside each section. In this section, the section value is "Q1."
- Actual data can take the form of table or crosstab blocks. They display data that relates to the section object. In this document, the data is displayed in a table containing revenue per resort.

To set up a Section/Block document:

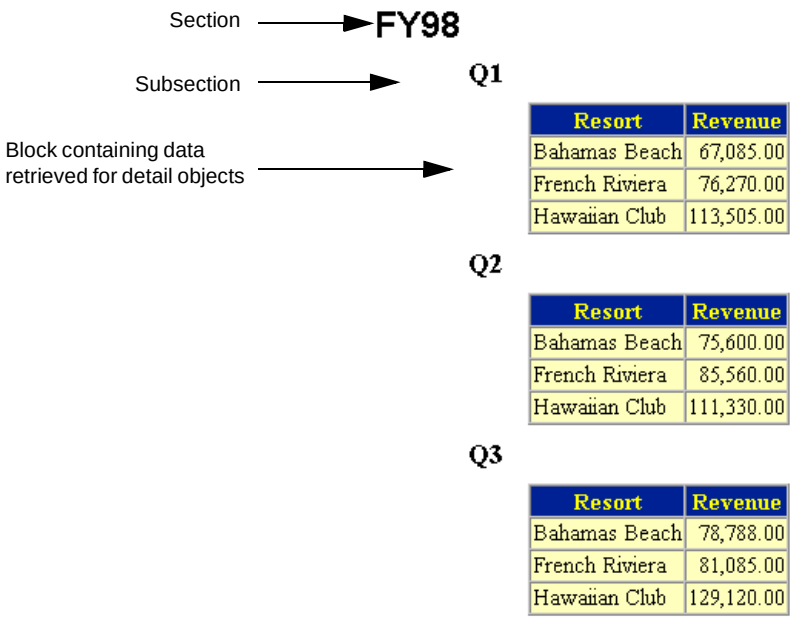
1. If it isn't already, set the Web Panel to Section/Block mode by clicking the Show/Hide Sections button in the toolbar.
2. Drop one or more objects into the Section panel. For each of these objects, a separate section is created. One section value appears in a cell inside each section.
3. Drop other objects into the Block panel. This block displays data that relates to the section object.
4. Generate the document by clicking the Get Results button.

Creating a Document with Sections, Subsections, and Blocks

A section/section/block document contains a primary section, then a secondary section, or sections within sections. This structure allows you to view data on two levels of detail.

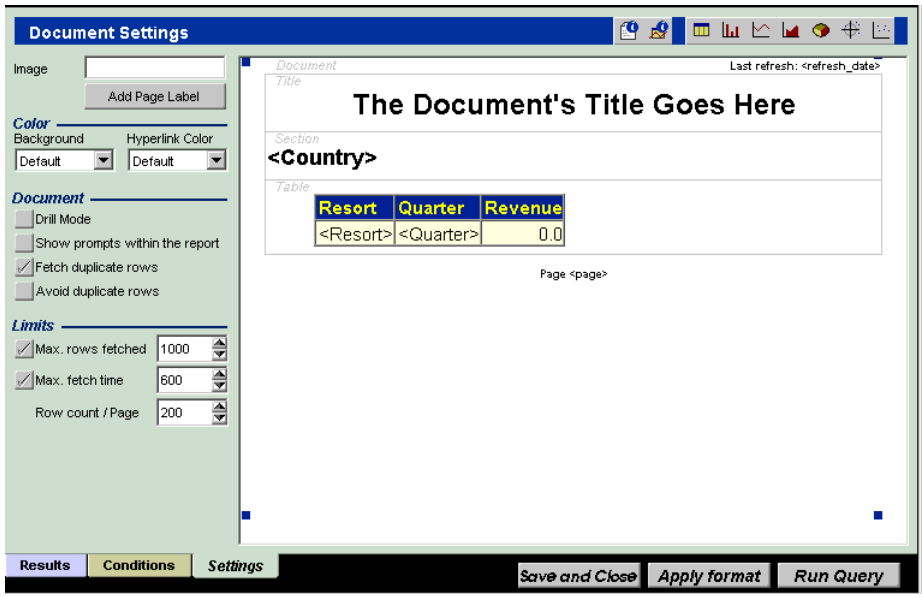
To create this kind of document, simply drop more than one object in your query's Section panel.

The following illustration shows part of a section/section/block document. The Year object is the primary section and the Quarter object is the secondary section. As a result, the document displays the section FY98, and the revenue for each resort per quarter in the subsection.


Section
FY98
Subsection
Q1
Block containing data retrieved for detail objects
Resort
Revenue
Bahamas Beach
67,085.00
French Riviera
76,270.00
Hawaiian Club
113,505.00
Q2
Resort
Revenue
Bahamas Beach
75,600.00
French Riviera
85,560.00
Hawaiian Club
111,330.00
Q3
Resort
Revenue
Bahamas Beach
78,788.00
French Riviera
81,085.00
Hawaiian Club
129,120.00

Using the Settings Tab

The third tab in the Web Panel is Settings. This tab contains options you can use to format your document. The options displayed vary according to the part of the document you select.



Note: How you use these settings varies considerably depending on whether you're using a Java or ActiveX Web Panel. The description for each group of settings in this topic reflect the Full Java Web Panel.
All of the document formatting and property settings are available in the two versions, but how they are presented, and how you access them, can be different. The ActiveX Web Panel also provides additional features. If you're using this Web Panel, please see the following section.

Defining Settings in the ActiveX Web Panel

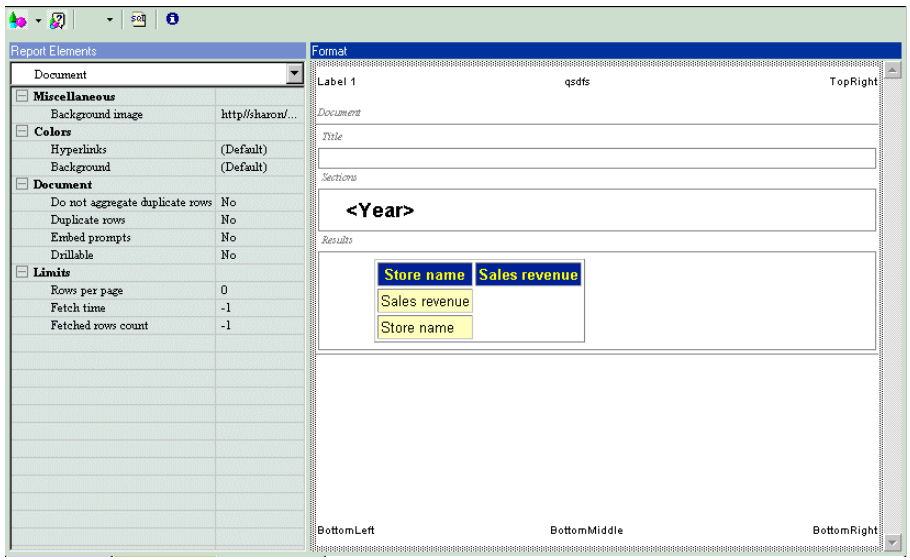
The Settings tab in the ActiveX Web Panel differs considerably from the same tab in the Java Web Panel. Most of these differences constitute important advantages:

- The document preview area to the right gives you a much more accurate preview of the final document than in the Java version, as it is already HTML-based.
  For example, you actually see a page header in place on the page, instead of creating it in the Settings area to the left, then having to wait until document generation to see how it looks.
  This also makes it easier to see how a selected image looks as the page background, where headers and footers are located on the page, word-wrap in cells, and more.
- At the top of the Settings area to the left, a Document Element drop-down list displays the structure of your document. It includes generic element names such as document and title, as well as the actual names of objects in the query. To set attributes for any of these elements, just click it in the list. The element is immediately selected in the preview area to the right, and the settings concerning that element appear to the left.
- You can use the Toggle Left Pane Display button in the toolbar to close the Settings area entirely, so that you can see more of the document preview without having to scroll.
- You can include six different page labels (left, middle and right, at the top and bottom of the page), whereas the Java Settings tab includes only three label options.

Settings presentation

Unlike in the Java Web Panel, the options in the ActiveX Settings tab are not organized in separately titled settings sets such as the Document Settings, Section Settings, etc. When you click on an element in the document preview area to the right, all the settings pertaining to that element automatically appear in the Settings area to the left.

These contextual settings are presented in two columns.



To expand or fold a group of settings, double-click the group title (for example, Document in the image above).

To modify a default setting, click next to it in the right-hand column:

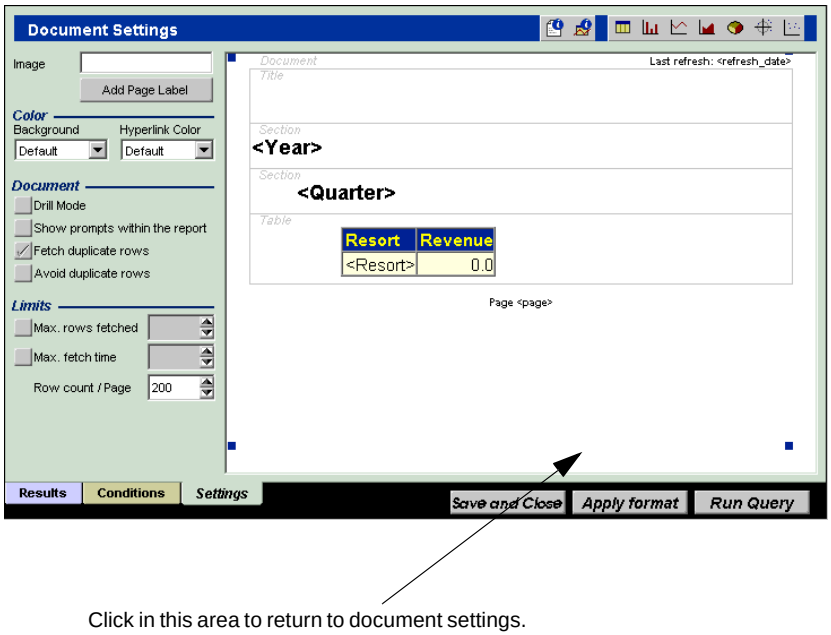
- If a Yes or No is required, the value toggles back and forth each time you click it.
- If text is required, an entry box opens.
- If a color is required, a palette opens.
- If a number is required, a spinbox opens.

All the settings available to you in the Java Settings tab are also available to you in the ActiveX Settings tab. They are not, however, presented in the same way, and may not be grouped in the same way on the page.

For example, in the Java version of the Settings tab, you create a page label in the Document Settings. In the ActiveX version, you create a page label by clicking any of the six header and footer slots in the document preview area, then typing its text in the Label setting in the settings that appear to the left.

Document Settings

When you click the Settings tab, the document settings are displayed by default on the left side of the tab. If you switch to another settings group, you can always switch back by clicking in the area outside other document elements in the preview area.



Click in this area to return to document settings.

The following table describes the settings you use to format your documents using the document settings:

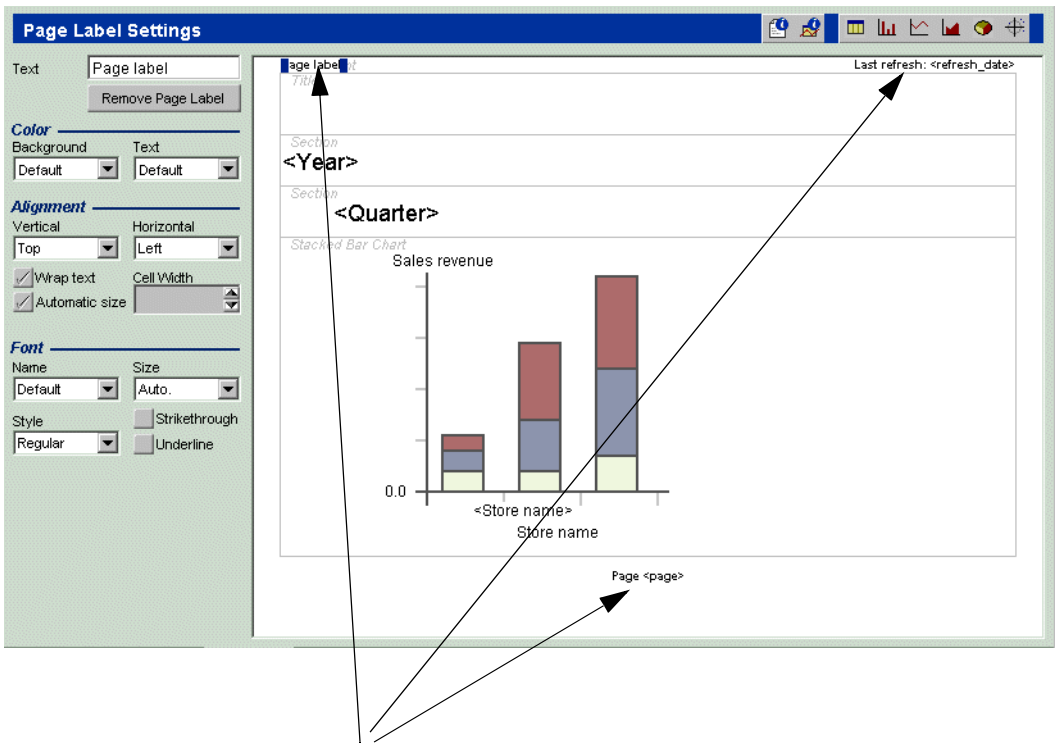
Setting Group	Setting	Description
	Image	You can use a picture as a background for your document. To do so, enter a valid URL in the Image entry box. You can put your picture on the HTTP server to which you're connected for running WEBINTELLIGENCE then use that server's URL. But it might be easier to have the picture file on your own computer, then use a URL in the following format: `file://C:\<FilePathAndName>` For example, a valid URL might be: file://C:\Windows\Myself.gif
	Add Page Label	If you click this, you can type in additional information that is displayed in the upper left-hand side of the document. This is ideal for adding dates or any other useful identifying information to the document. Clicking this option takes you to the page label settings.
Color	Background	Select or change the background color for the entire document.
	Hyperlink	If you use the Index option in the Section Settings group, this option lets you select the background color for the Hyperlink text column.
Document	Drill Mode	Check this to make the document drillable. This means that you or another user can "drill down" the document to view additional information without building a new query. See "Setting Up A Drillable Document" on page 212.

Setting Group	Setting	Description
	Show prompts within the document	Check this to display all the prompts in a frame at the top of the document.
	Fetch duplicate rows	The database used to generate the document may contain records with duplicate values. If you want your document potentially to contain duplicate rows of data, check this option.
	Avoid duplicate rows aggregation	The database used to generate the document may contain records with duplicate values. To make sure your document won't contain duplicate rows of data, check this option.
Limits		Use these settings to limit both the amount of data retrieved or displayed, and the amount of time used to retrieve the data.
	Max. Rows Fetched	To limit the maximum number of lines to be fetched, check this option, then set the number using the spinbox. For example: If Maximum Rows Fetched = 1, only one row of the report is retrieved. The default setting for this parameter is 0. When the value is set to 0, all available data is retrieved. If a restriction on the number of rows has been set by the Universe Designer or Supervisor, this limit will apply.
	Max. Fetch Time	To limit the maximum number of seconds used to fetch the data, check this option, then set the number using the spinbox.
	Row count/ Page	Change the number of lines of data per document page using the spinbox. The default setting is 200 rows per page.

Page Label Settings

When you create a page label in the document settings in the Java Web Panel, these settings appear automatically. You can also open these settings in either form of Web Panel by clicking on the page label in the document preview area.

This group of options lets you define the label's alignment, font, and background color.



Click in any of these areas to display page label settings.

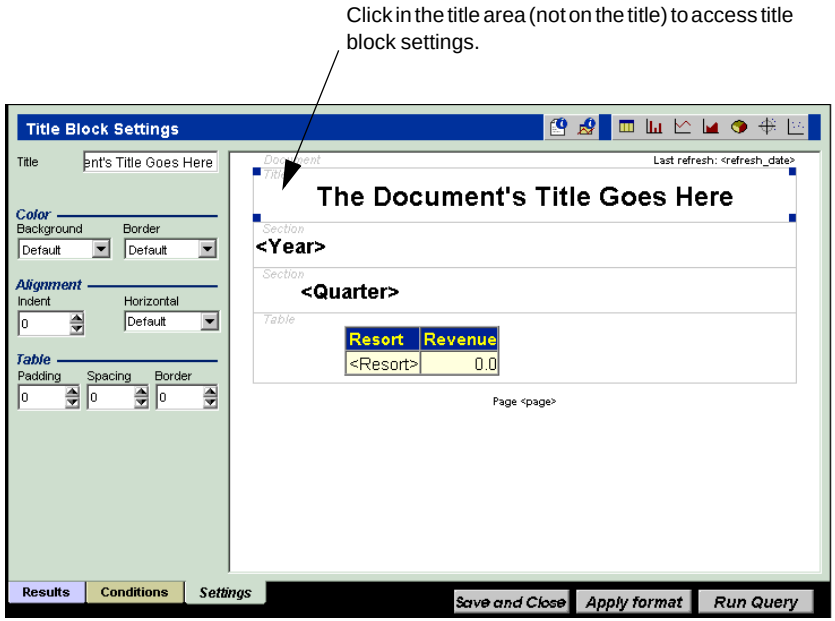
The following table describes the settings you use to format your documents using the page label settings:

Setting Group	Setting	Description
	Text	Use this box to enter the text you want to use as a page label. To remove a page label: • In the Java Settings tab, click the Remove Page Label button • In the ActiveX Settings tab, click the label in the document preview area. In the settings that appear to the left, click the text corresponding to the Label setting in the Miscellaneous group. Delete the label text, now highlighted in an entry box. Now click anywhere else in the Settings tab.
	Add Page Label	If you click this, the page label is deleted and you return to the document settings.
Color	Background	Select or change the background color for the page label.
	Text	Select or change the text color for the page label.
Alignment		Title Cell alignment options affect the page label's alignment *within the cell*.
	Vertical	Use this to adjust the page label's vertical alignment within the cell.
	Horizontal	Use this to adjust the page label's horizontal alignment within the cell.
	Wrap text	Check this option if you want a page label that exceeds the defined cell width to automatically wrap to a new line.

Setting Group	Setting	Description
	Automatic size	Check this option if you want the width of the page label cell to automatically adjust to the size of the text.
	Cell width	Set the cell width here if the Automatic size option isn't checked.
Font	Name	Select the font type from the pop-up list.
	Size	Select the font size from the pop-up list.
	Style	Select the font style from the pop-up list.

Title Block Settings

Click inside the Title box in the preview area, and the settings change to title block settings. This group of options lets you format the title's placement on the document page, and its background color. You can also add a border to the title.



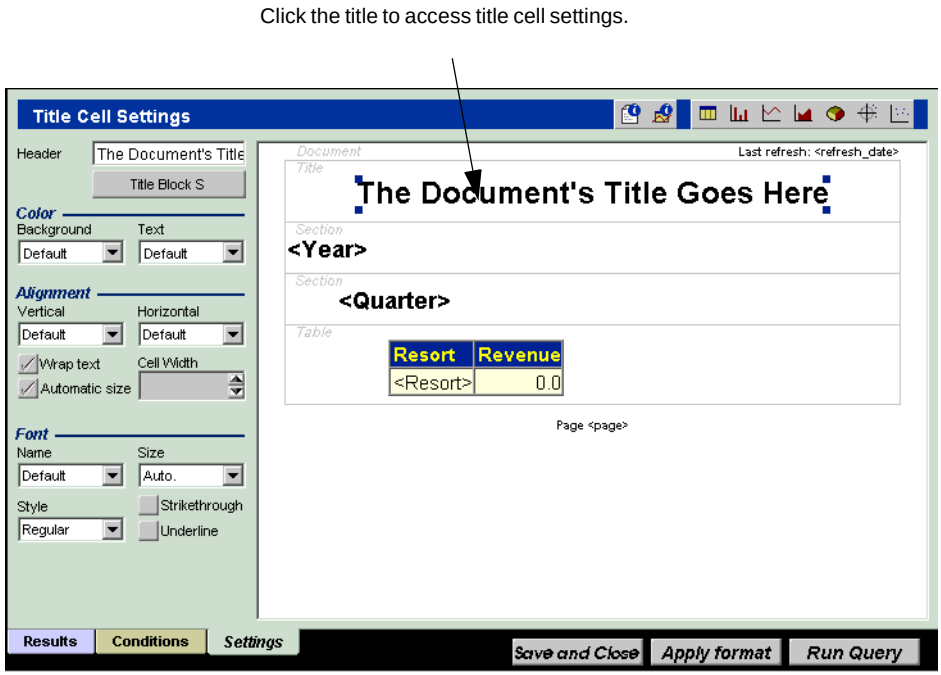
The following table describes the settings you use to format your titles using the title block settings:

Setting Group	Setting	Description
Title		To give your document a title, enter it in the Title box. As you type it, it appears in the Title preview area to the right.
Color	Background	Use this option to select or change the background color for the title area.
	Border	If you use a border with your title, this option lets you select the color. This option works only if the title has a border.

Setting Group	Setting	Description
Alignment		These options let you control the placement of the title *on the document page*.
	Indent	Use the spinbox to set the title indentation.
	Horizontal	This controls the horizontal placement of the title.
Table		
	Border	You can add a border to the title. Use this spinbox to define the thickness of the border. When you add a border to the title, in fact, an inner and outer border are added. If you leave the Spacing option set to 0, the border appears as a single line. However, if you increase the spacing, the border splits into a thin inner border and a thicker outer border.
	Padding	Use this spinbox to increase or decrease the spacing between the title's text and the border.
	Spacing	Use this spinbox to increase or decrease the spacing between the title and its border.

Title Cell Settings

Click the actual title in the preview area to change to the title cell settings. These are the settings you use to format the title itself (font, title alignment within the cell, title background).



Tip: You can return to title block settings by clicking in the title area.

The following table describes the settings you use to format your title cells using the title cell settings:

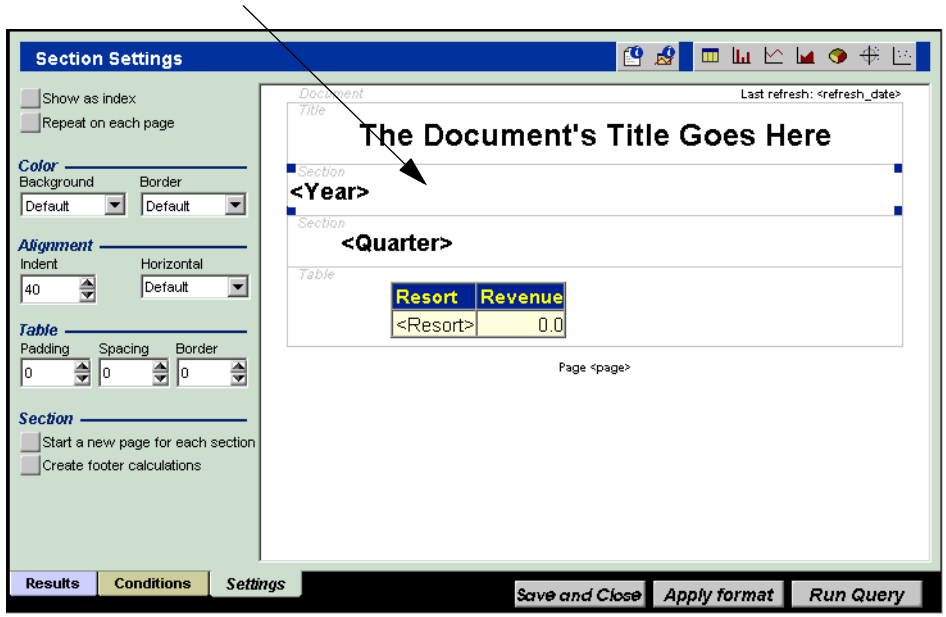
Setting Group	Setting	Description
Title		This box contains the document's title. You can modify it if you want.
Color	Background	Change the title's background color. When you select a background color for the title, it affects the title cell background color only.
	Text	Change the color of the title text.
Alignment		Title Cell alignment options affect the title's alignment *within the cell*.
	Vertical	Use this option to control the title's vertical alignment within the cell.
	Horizontal	Control the title's horizontal alignment within the cell.
	Wrap text	If you want a title which exceeds the defined cell width to automatically wrap to a new line, check this option.
	Automatic size	If you want the width of title cell to automatically adjust to the size of the text, check this option.
	Cell width	If the Automatic size option isn't checked, you can set the cell width here.
Font	Name	Select the font type from the pop-up list.
	Size	Select the font size from the pop-up list.

Setting Group	Setting	Description
	Style	Select the font style from the pop-up list. The default is Regular.
	Strikethrough	Check this box if you want the title text to be barred.
	Underline	Check this box if you want the title text to be underlined.

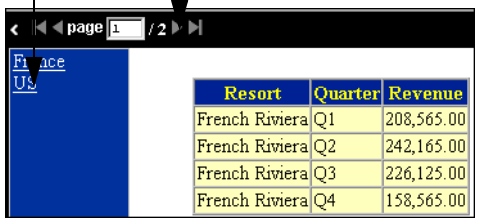
Section Settings

Click inside the Section preview area (but not on the section title), and the settings options change to section settings. This group of options lets you format the section heading's placement on the document page, and the background color. You can also add a border for the section heading.

Click inside the section area (but not on the section title) to access section settings.



The following table describes the settings you use to format your document's sections using the section settings:

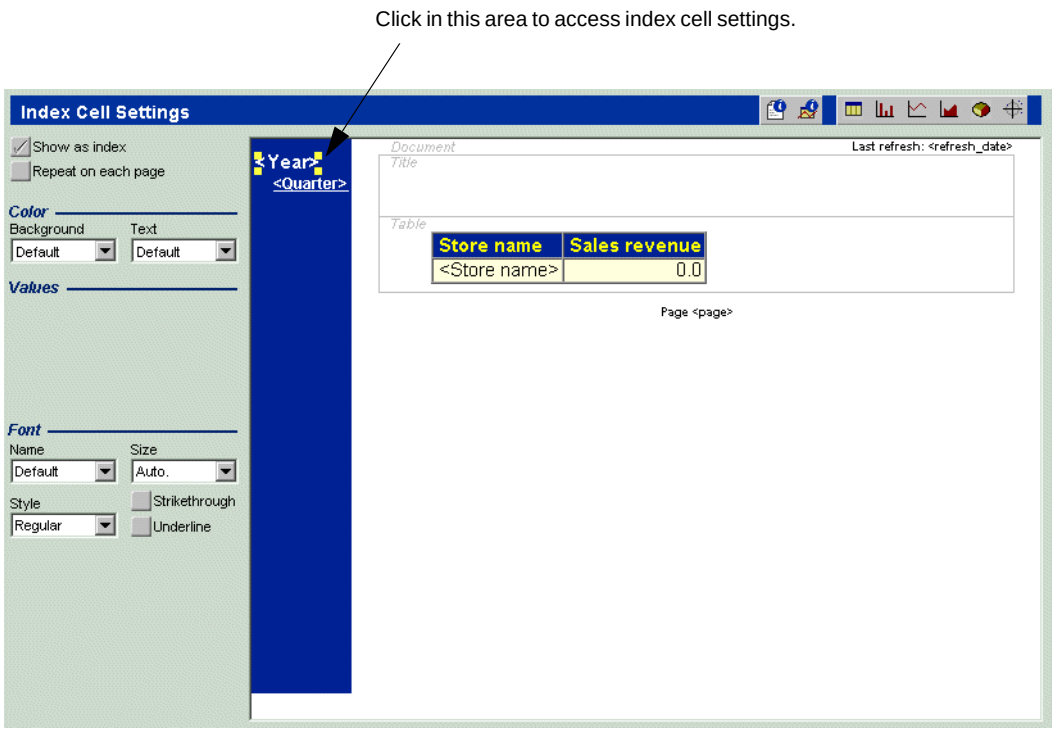
Setting Group	Setting	Description
	Show as index	When you check this option, the section headings are displayed as a hyperlinked index to the left of the block. To display the results for a different section, click its hyperlink. For example, in the sample table below, the Country object was added to the Section panel, then Show as index was selected. When the results are displayed, only the table for France is displayed, but hyperlinks for the US as well as France are also displayed in an index. To view the results for the US, click the hyperlink or the document toolbar arrow. Switch to the US table by clicking the page arrow, or by clicking the US hyperlink. 
	Repeat on each page	Select this option to display the section header title on each page.
Color	Background	Use this option to select or change the background color for the section header. When you change the background color, it is displayed as a narrow band of color that extends horizontally across the section heading.
	Border	If you're using a border with your section header, this option lets you select the color. This option works only if the title has a border.

Setting Group	Setting	Description
Alignment		These options let you control the placement of the section heading *on the document page*.
	Indent	Use the spinbox to set the section heading indentation.
	Horizontal	This controls the horizontal placement of the section heading. The default is Left.
Table	Border	You can add a border to the section heading. Use the spinbox to define the thickness of the border. When you add a border to the section heading, in fact, an inner and outer border are added. If you leave the Spacing option set to 0, the border appears as a single line. However, if you increase the spacing, the border splits into a thin inner border and a thicker outer border.
	Padding	Use the spinbox to increase or decrease the spacing between the section heading's text and the border.
	Spacing	Use the spinbox to increase or decrease the spacing between the inner and outer border lines.
Section		These options let you control the way section headings are used.
	Start a new page for each section	If you check this option, each section is displayed on a separate page. The arrows in the lefthand corner of the document navigation bar let you move back and forth between the different section blocks.
	Create footer calculations	If you check this option, a calculation footer is added to the bottom of the table.

Index Cell Settings

If you have set up the section headings so that they're displayed as a hyperlinked index, you can control the colors used for the font, the hyperlink, and the index column.

To access the index cell settings, click the Index representation in the document preview area.



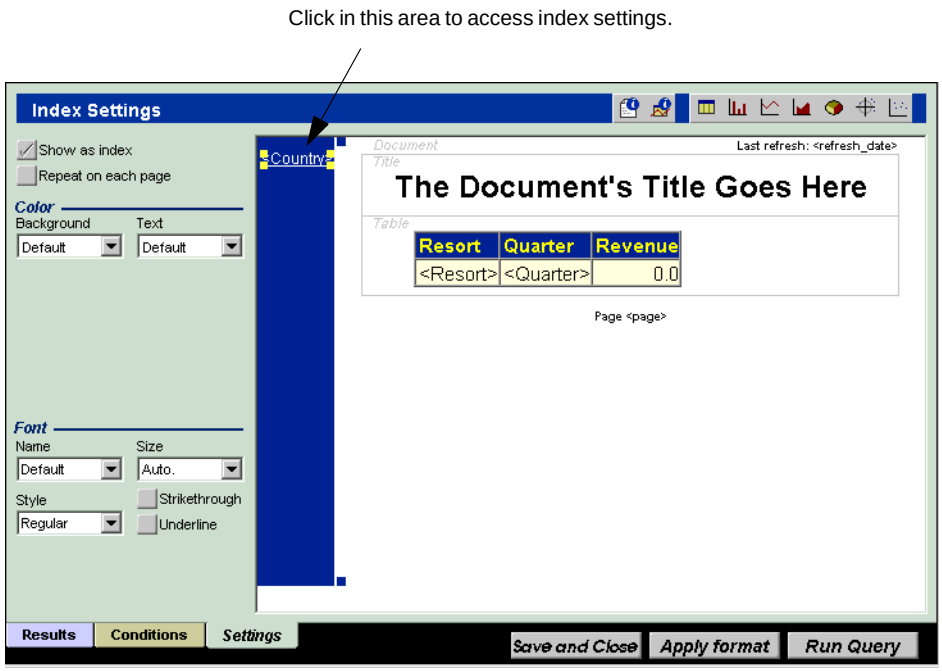
The following table describes the settings you use to format your document's index:

Setting Group	Setting	Description
	Show as index	When you check this option, section headings are displayed as a hyperlinked index to the left of the block. To view the results for a different section, click its hyperlink.
	Repeat on each page	Select this to display the section header title on each page.
Color	Background	Changes the background color for each index cell.
	Text	Sets the color for the hyperlink text.
Font	Name	Select the font type from the pop-up list.
	Size	Select the font size from the pop-up list.
	Style	Select the font style from the pop-up list.
	Strikethrough	Check this option to bar the title text.
	Underline	Check this option to underline the title text.

Index Settings

If you have set up the section headings so that they're displayed as a hyperlinked index, you can control the colors used for the font, the hyperlink, and the index column.

To access the index settings, click the Index representation in the Settings preview area.

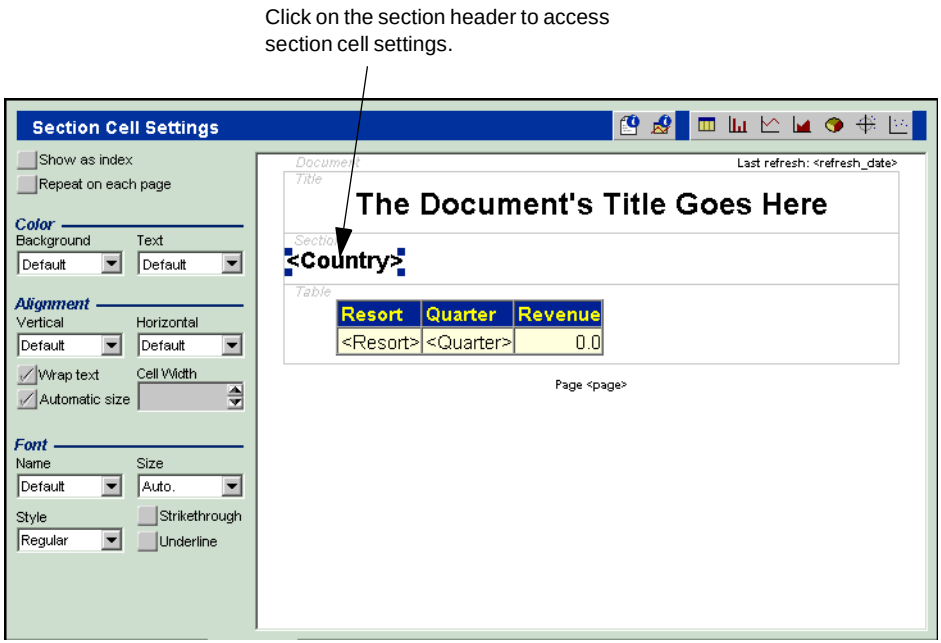


The following table describes the settings you use to format your document's index using the index settings:

Setting Group	Setting	Description
	Show as index	When you check this option, section headings are displayed as a hyperlinked index to the left of the block. To display the results for a different section, click its hyperlink.
	Repeat on each page	Select this to display the section header title on each page.
Color	Background	Changes the background color for the entire index.
	Text	Sets the color for the hyperlink text.
Font	Name	Select the font type from the pop-up list.
	Size	Select the font size from the pop-up list.
	Style	Select the font style from the pop-up list.
	Strikethrough	Check this option to bar the title text.
	Underline	Check this option to underline the title text.

Section Cell Settings

Click on the section header (the object name enclosed in <>) in the preview area to change to the section cell settings. These are the settings you use to format the section heading (font, title alignment within the cell, and section heading background).



Note: You can apply different formatting options to individual section headings.

The following table describes the settings you use to format your document's section cells using the section cell settings:

Setting Group	Setting	Description
	Show as index	When you check this option, section headings are displayed as a hyperlinked index to the left of the block. To display the results for a different section, click its hyperlink.
	Repeat on each page	Select this to display the section header title on each page.
Color	Background	When you select a background color for the section heading, it affects the title cell background color only.
	Text	To change the color of the section heading text, choose a color from the list.
Alignment		These options affect the section heading's alignment *within the cell*.
	Vertical	Control the section heading's vertical alignment within the cell.
	Horizontal	Control the section heading's horizontal alignment within the cell.
	Wrap text	If you want lines of data that exceed the defined cell width to automatically wrap to a new line, check this option.
	Automatic size	If you want the width of section heading cell to automatically adjust to the size of the text, check this option.
	Cell width	If the Automatic size option isn't checked, you can set the cell width here.
Font	Name	Select the font type from the pop-up list.
	Size	Select the font size from the pop-up list.

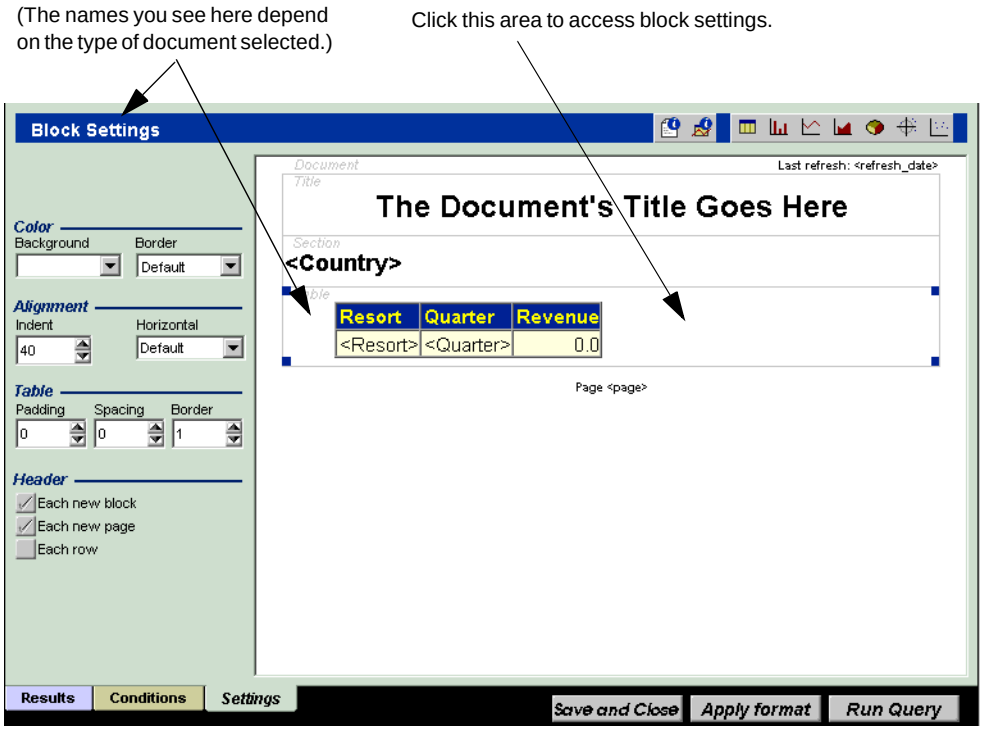
Setting Group	Setting	Description
	Style	Select the font style from the pop-up list. The default is Regular.
	Strikethrough	Check this option if you want the title text to be barred.
	Underline	Check this option if you want the title text to be underlined.

Block Settings

Note: Many block settings depend on the type of document being formatted. Therefore you will not see all of the options described in this section at the same time. For example, if you're formatting a table, the preview area is labelled Table, and the block settings area contains table header options. However, if you are formatting a 3D Bar chart, the block settings area contains options for displaying walls or a floor with the bars.

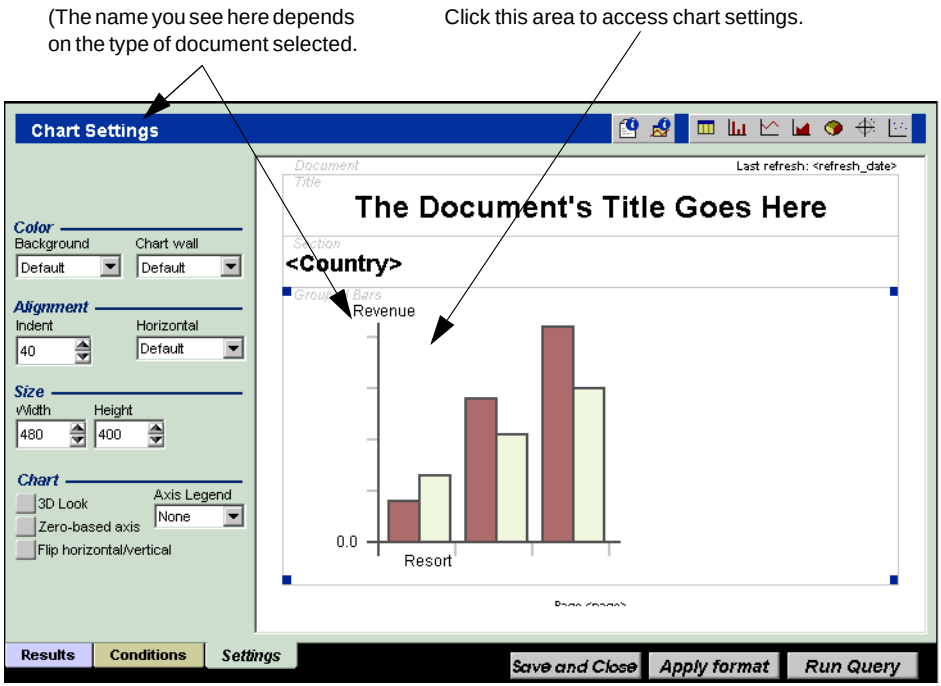
Click inside the Table preview area and the Settings change to block settings or chart settings. (The actual name depends on the type of document you're formatting. For example, if you're formatting a table, the preview area is labelled table; if you're formatting a grouped bar chart, the preview area is labelled Grouped Bars.) This group of options lets you format the placement of the body of the data (which can be a table or chart) on the document page, and the background color. You can also add a border.

Block settings for a table



For more information regarding options for block settings, see page 192.

Chart settings for a grouped bar chart



For more information regarding options for chart settings, see page 193.

The following table describes the Color and Alignment settings you can use to format your document block, whether it is a table or a chart:

Setting Group	Setting	Description
Color	Background	Use this option to select or change the background color for the data block (i.e. the background color for the table or chart).
	Border/Chart wall	If you use a border with the data block, the Border option (or Chart wall option, if you are formatting a chart) lets you select the border color. This option works only if the data block has a border.
Alignment		These options let you control the placement of the block of data *on the document page*.
	Indent	Use the spinbox to set the block indentation.
	Horizontal	This controls the horizontal placement of the block.

Block Settings for Tabular Documents

Note: This section refers only to Table, Financial, Form or Crosstab documents.

In addition to the Color and Alignment block settings, the following group of Block Setting options are available when the selected document type is Table, Financial, Form or Crosstab:

Setting Group	Setting	Description
Table	Border	You can add a border to the block. Use the spinbox to define the thickness of the border. When you add a border, in fact, an inner and outer border are added. If you leave the Spacing option set to 0, the border appears as a single line. However, if you increase the spacing, the border splits into a thin inner border and a thicker outer border.
	Padding	Use the spinbox to increase or decrease the spacing between the block's text and the border.
	Spacing	Use the spinbox to increase or decrease the spacing between the block and its border.
Header		These options are not available for Form documents.

Setting Group	Setting	Description
	Each new block	Check this option to display the header only at the top of each new block.
	Each new page	Check this option to display the header only at the time of each new page.
	Each row	**Note:** This option is not available for crosstab documents. Check this option if you want the header displayed above each row of data in the document.

Block Settings for Chart Documents

Note: This section refers only to chart documents, for example, grouped bar, pie, scatter, etc.

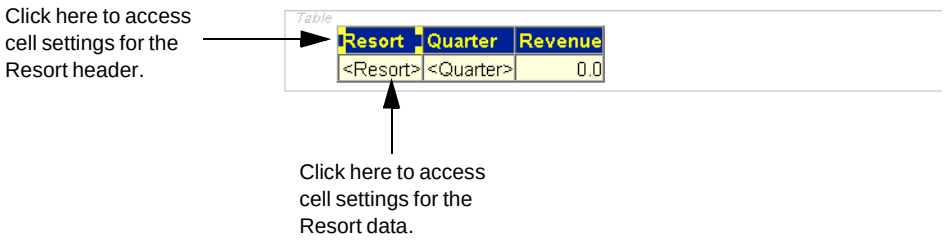
In addition to the Color and Alignment block settings, the following group of block setting options are available when the selected document type is a chart:

Setting Group	Setting	Description
Size	Width	Use the spinbox to change the width of the chart.
	Height	Use the spinbox to change the height of the chart.
Chart		The following options are available for non-3 dimensional charts only.
	3D Look	Check this option to give the chart a 3D look.

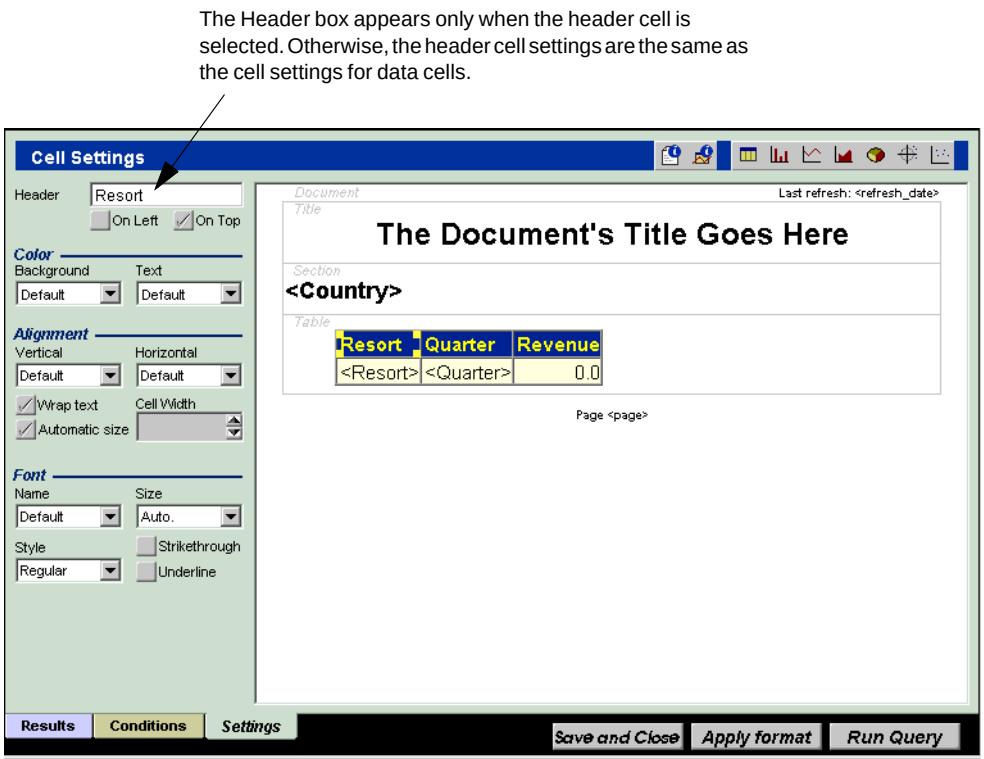
Setting Group	Setting	Description
	Zero-based Axis	**Note:** This option is not available for pie, ring, polar, and scatter charts. Forces the axis to start at zero.
	Flip horizontal/ vertical	**Note:** This option is not available for pie, ring, polar, and scatter charts. Flips the horizontal and vertical axes.
	Axis Legend	The following options are available for 3 dimensional charts only.
	Show floor	Click this option to display the chart floor. This option is selected by default.
	Show left wall	Click this option to display a left wall with the chart. This option is selected by default.
	Show right wall	Click this option to display a right wall with the chart. This option is selected by default.

Cell Settings

When you click inside a data header cell, you access the cell settings for that header. When you click inside a data cell, you access the cell settings for that group of data cells.



For example, if you click in the header cell for Resort, the Settings tab opens the cell settings. Any changes you make will affect only the header.



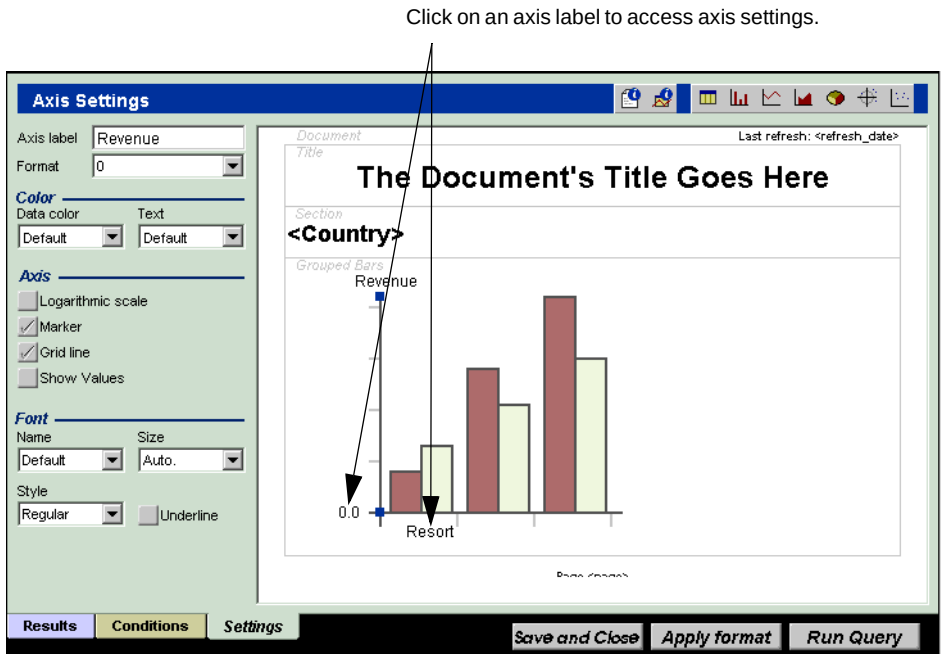
The following table describes the settings you can use to format your document's cells using the cell settings:

Setting Group	Setting	Description
Header	Header	The header box appears only when a header cell is selected. You can type a new name in the header box to change the existing header.
	On Left/On Top	Check On Left to display the header to the left of the data column. Select On Top to display the header on top of the data column. You can select both options.
Color	Background	To select the cell background color, choose the color from the pop-up list.
	Text	To change the color of the cell text, choose a color from the list.
Alignment		These options let you control the placement of the block of data *on the document page*.
	Indent	Use the spinbox to set the block indentation.
	Horizontal	This controls the horizontal placement of the block.
	Wrap text	If you want lines of data that exceed the defined cell width to automatically wrap to a new line, check this option.
	Automatic size	If you want the width of section heading cell to automatically adjust to the size of the text, check this option.
	Cell width	If the Automatic size option isn't checked, you can set the cell width here.
Font	Name	Select the font type from the pop-up list.
	Size	Select the font size from the pop-up list.

Setting Group	Setting	Description
	Style	Select the font style from the pop-up list. The default is Regular.
	Strikethrough	Check this to bar the axis label text.
	Underline	Check this to underline the axis label text.

Axis Settings

When you click on the axis label of the chart in the Settings preview area, the axis settings appear. These options let you format the axis and the axis label.



The following table describes the settings you can use in the axis settings:

Setting Group	Setting	Description
	Axis label	By default, the axis label is the name of the object it corresponds to. You can rename it by typing a new label in the Axis label box.
	Format	Select the format for the numbers displayed along the axis line from the pop-up list. It includes formats for numbers, dates and times, and Boolean expressions. For example, 0.00 means that the numbers displayed will use decimal points. For more information about formatting numbers, see "Formatting the Results of a Calculation" on page 148
Color	Data color	Select the data color from the pop-up list.
	Text	Select the text color from the pop-up list.
Axis	Logarithmic scale	Click this option to use a logarithmic (powers of ten) scale along the axis line. A logarithmic scale is useful if your data covers a wide range of values.
	Grid line	Check this option to include grid lines along the axis.
	Show values	Click this option to display data values along the axis line.
Font	Name	Select the font type from the pop-up list.
	Size	Select the font size from the pop-up list.
	Style	Select the font style from the pop-up list.
	Strikethrough	Check this option to bar the axis label text.
	Underline	Check this option to underline the axis label text.

Chapter 7 Working in Drill Mode

In this chapter

What is Drill Mode?

Drill mode allows you to analyze the data in a document by breaking it down and viewing it from different angles and on different levels of detail to pinpoint the driving factor behind a good or bad result.

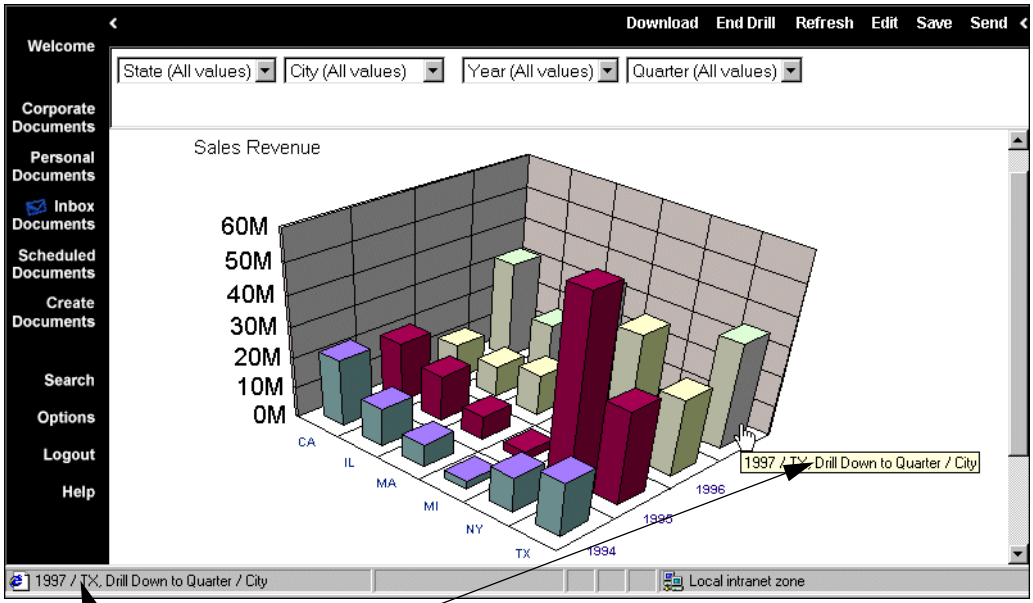
In drill mode, you analyze data in different levels of detail by analyzing the data retrieved from the database or performing a new query to obtain more data.

For information about working in drill mode, see "Hierarchies and Dimensions" on page 205.

Example **Why is revenue worse in this resort than in the others?**

Your document contains a table which displays revenue per resort. You see that the revenue in a resort is particularly low. If the document is drillable, you can drill down a level to display the individual service lines (accommodation, food and drinks, etc.). If this data doesn't answer your question ("Why is revenue low in this resort?"), you can drill down again, to display data for the services in the service lines.

When working in drill mode, you are guided through the necessary steps by dynamic graphical features that appear as you work (see the callouts in the graph and the indications in the status line).



The status line and the tooltip tell you when your cursor is positioned over a drillable area.

Drilling Overview

1. The default hierarchy

2. Two objects from the Resort Hierarchy are included in the Query.

The data cube will contain information for Resort, and Service Line but not for Service or Country.

3. The query result

Resort △	Year	Revenue
Bahamas Beach	FY93	287,929.00
Bahamas Beach	FY94	307,400.00
Bahamas Beach	FY95	376,115.00
French Riviera	FY93	295,940.00
French Riviera	FY94	280,310.00
French Riviera	FY95	259,170.00
Hawaiian Club	FY93	479,685.00
Hawaiian Club	FY94	519,530.00
Hawaiian Club	FY95	480,445.00

4. Click the up arrow to drill up one level to Country. Because Country is outside the "cube" of data generated by the query, a new query will be made. See page 212 for more information.

5. Click the hyperlink to drill down one level to the Service Line data. Because this data is already stored in the data cube, no new query is needed.

* You can add additional objects to the data cube by extending the document's scope of analysis. For information, see page 210.

Hierarchies and Dimensions

The person who creates the universe classes and objects organizes them in a hierarchy, with the most general object in the class at the top and the most detailed at the bottom.

Objects are grouped in this way to make it easy for you to find what you are looking for. They are classified inside the groups so that if you want to make a high level report you know you need to include objects at the top of the list in your query, and if you want a more detailed report then you choose objects from further down the list. This ordering of objects is called a *hierarchy*.

Objects are also organized in this way for drilling. When you analyze data in drill mode, you use hierarchies. The Universe classes are the default hierarchies you use for drilling but the Universe designer can also set up custom hierarchies. You can also create and edit hierarchies in your reports.

Drill hierarchies only contain dimension objects. In drill mode, you drill down on dimensions, for example from Year to Quarter to Month. At each level, measures, such as Revenue or Profit Margin, are recalculated.

Example **The Resort hierarchy in the Island Resorts universe**

For example, the Resort hierarchy order on page 204 is:

- Country
- Resort
- Service Line
- Service

If the Resort object is used in the query, when you drill down a level, the Service Line data is revealed. If you drill up a level, the Country data is revealed.

The classic themes on which a designer or advanced user creates hierarchies are geography, time and product. In the demo universe Island Resorts Marketing, there are four hierarchies:

- Resort (Country, Resort, Service Line, Service)
- Sales (Year, Quarter, Month, Week, Invoice Date)
- Customer (Country of Origin, Region, City, Customer).
- Reservations (Reservation Year, Reservation Quarter, Reservation Month, Reservation Week, Reservation Date).

When you set up a document for drilling, you include high level objects to display in your table or chart but include more detailed objects in your scope of analysis. WEBINTELLIGENCE retrieves these objects from the database and stores them behind the scenes in your document so that they are there when you or another user needs more data.

Before you can analyze data in drill mode, you have to set up this behind-the-scenes data. For information, see "Planning the Scope of Analysis" on page 208.

Making a Document Drillable

You can make any WEBINTELLIGENCE document drillable from the Web Panel.

Before creating a drillable document, however, you should think about your intended audience. Not everyone who receives your document will have access rights to the data source the document is based on. In this case, the recipient will only be able to drill on the information available in the document. You can only retrieve new data if you have access to the data source.

For example, if you think other users will want to drill down from Quarter to Month, or from Quarter up to Year, you should set the Scope of Analysis to include those objects in the query.

To make a document drillable:

1. With the document definition open in the Web Panel, do one of the following:
   - In the Results tab, either check Drill mode (in the lower right of the tab), or click Drill in the toolbar.
   - In the Document Settings options in the Settings tab, check Drillable Document.
2. Click Run Query.

   The drillable document is displayed in the Document Results page.

After you enable drill mode and run the query, the following changes take place in the document:

- The drillable information in document tables is underlined, representing hyperlinks to the other levels.
- Some of the headers may contain an up arrow, to indicate that you can drill up a level.

Users with access to the document can now drill on the data in the document using WEBINTELLIGENCE.

Planning the Scope of Analysis

You may realize that a dimension you need for your analysis is not available in your document. As you drill, you can bring in data that was not originally included in the analysis either by extending the scope of analysis in the Scope of Analysis section of the Web Panel, or by editing your query to bring in more data from the database.

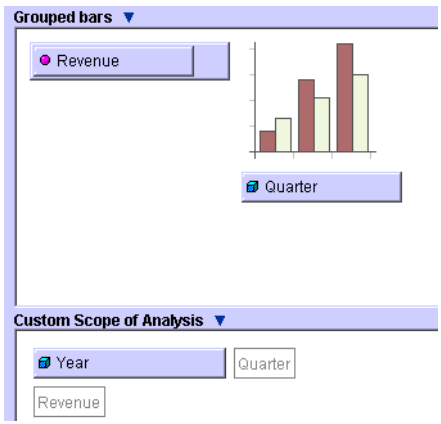
WEBINTELLIGENCE provides you with the following scopes of analysis:

- Custom Scope of Analysis
- One level of analysis
- Two levels of analysis
- Three levels of analysis

To define the scope of analysis you want to use, see "Setting the Scope of Analysis" on page 210.

Custom Scope of Analysis

When you select a custom scope of analysis, you fill in the hierarchy manually.



In the sample image above, the Quarter object provides the X-axis data for the graph, but Year has been added to the custom scope of analysis. When the query is next generated, the cube will contain data for Year as well as Quarter. The user will be able to drill up from Quarter to Year without generating another query.

Note: Only the objects included in the query are used to build the cube. If you use a custom scope of analysis, be careful not to leave unintentional gaps in the hierarchy. For example, if you build a query that includes Service Line data, and you then add Country to the custom scope of analysis, the data for Resort is not part of the cube. You cannot drill up from Service line to Resort without drilling outside the cube.

One, Two, or Three Levels of Analysis

When you select one, two or three levels of analysis, the hierarchical level(s) below the query objects are added automatically.

Example **Changing the scope of analysis in a document**

For example, the Island Markets Resort hierarchy looks like this:

If you add Country to the Block panel:

- One level of analysis adds Resort to the scope of analysis.
- Two levels of analysis adds Resort and Service Line to the scope of analysis.
- Three levels of analysis adds Resort, Service Line and Service to the scope of analysis.

Tip: After you've added the levels of analysis, you can still switch to Custom Scope of Analysis and add the hierarchical level(s) above the query object.

Setting the Scope of Analysis

You set the scope of analysis for your document slightly differently depending on whether you're using the Java or ActiveX Web Panel.

Using the Java Web Panel

To set the scope of analysis using the Java Web Panel:

1. Click the Scope of Analysis button in the toolbar. The Scope of Analysis section opens up in the Web Panel. By default, the Section panel is set to Custom Scope of Analysis.

   Any objects you've added to the Block panel are outlined in gray in the Scope of Analysis section.

2. If you want to change the scope of analysis, click and hold the down arrow. From the pop-up list, select the scope of analysis you want to use.

   The section name changes to reflect the selected scope of analysis.

3. If you've selected Custom Scope of Analysis, fill in the hierarchy by dragging the object from the Hierarchies list to the Custom Scope of Analysis section.

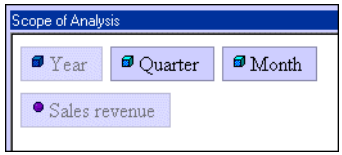
Note: In the Light applet, you cannot specify one, two, or three levels down for the scope of analysis. You must set a custom scope of analysis by dragging objects from the Hierarchies list and dropping them in the Custom Scope of Analysis section.

Using the ActiveX Web Panel

To set the scope of analysis using the ActiveX Web Panel:

1. Click the Scope of Analysis button in the toolbar.
   The color of the button becomes lighter, indicating that the scope of analysis has been activated, and a Scope of Analysis section banner appears at the bottom of the Section/Detail panel.

   When you double-click this section, it opens to display the objects included in the scope of analysis.



   Any objects you've added to the Block panel are outlined in gray in the Scope of Analysis section. The other objects represent different levels you can include in their corresponding scope of analysis.

   In the image above, for example, the scope of analysis for the Year object can extend to Quarter and Month.

2. If you want to change the scope of analysis, click and hold the down arrow. From the pop-up list, select the scope of analysis you want to use.

   The toolbar button changes to reflect the selected scope of analysis.

3. If you've selected Custom Scope of Analysis, fill in the hierarchy by dragging the object from the Hierarchies list to the Custom Scope of Analysis section.

Setting Up A Drillable Document

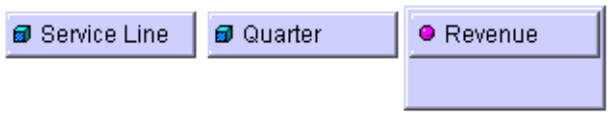
When you run a query, the data is retrieved from the database and stored as part of the document. The stored information is called a "cube." You use drill mode to drill through the different levels of data in the cube.

When you drill up or down into a document, all the information in the cube is available -- this means that when you drill, WEBINTELLIGENCE retrieves data from the cube instead of querying the database.

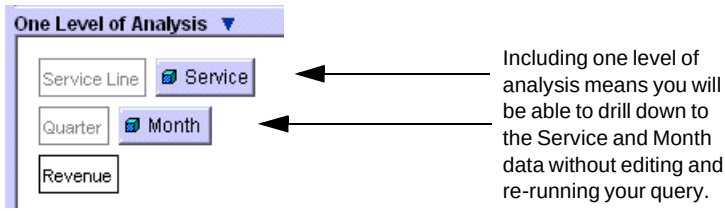
However, if you have access rights to the universe, you can also drill outside of the cube to retrieve new data. In this case, WEBINTELLIGENCE automatically retrieves the additional data from the database.

Example **Drilling outside the cube for additional data**

You are building the following query:



You want to be able to drill down one level of the hierarchy, so you add one level to the scope of analysis:



After you enable drill mode and run the query, you have the following table:

Service Line △	Quarter △	Revenue
Accommodation	Q1	544,576.00
Accommodation	Q2	569,522.00
Accommodation	Q3	589,112.00
Accommodation	Q4	514,914.00
Food & Drinks	Q1	118,595.00
Food & Drinks	Q2	124,000.00
Food & Drinks	Q3	158,215.00
Food & Drinks	Q4	154,020.00
Recreation	Q1	127,445.00
Recreation	Q2	128,295.00
Recreation	Q3	137,370.00
Recreation	Q4	120,460.00

If you position your cursor over one of the hyperlinks, the tooltip indicates that you can drill down to Service or Month.

You want more detailed information about the revenue generated by specific accommodation services, so you drill down one level:

Service △	Quarter △	Revenue
Bungalow	Q1	115,080.00
Bungalow	Q2	114,800.00
Bungalow	Q3	127,160.00
Bungalow	Q4	103,770.00
Hotel Room	Q1	159,138.00
Hotel Room	Q2	174,396.00
Hotel Room	Q3	184,362.00
Hotel Room	Q4	186,972.00
Hotel Suite	Q1	270,358.00
Hotel Suite	Q2	280,326.00
Hotel Suite	Q3	277,590.00
Hotel Suite	Q4	224,172.00

But now you want to see the yearly revenue generated by the service lines. When you position your cursor on the arrow next to Quarter, note that the browser message is: Drill Up to Year (New Query). This is because you are drilling for information that is not contained in the cube – or outside of the cube – and as a result, WEBINTELLIGENCE must retrieve more data from the database.

Drilling in a Document

Once you've generated the document and it's displayed in the Document Results page, you're ready to begin drilling.

How can you tell if a document is drillable?

If you didn't create the document, you can tell an open document is drillable when up or down arrows appear next to column headers, or next to axis titles or legends in charts. Hyperlinked data may also indicate drillable data.

To drill, simply position your cursor over a hyperlink, title or arrow, then click.

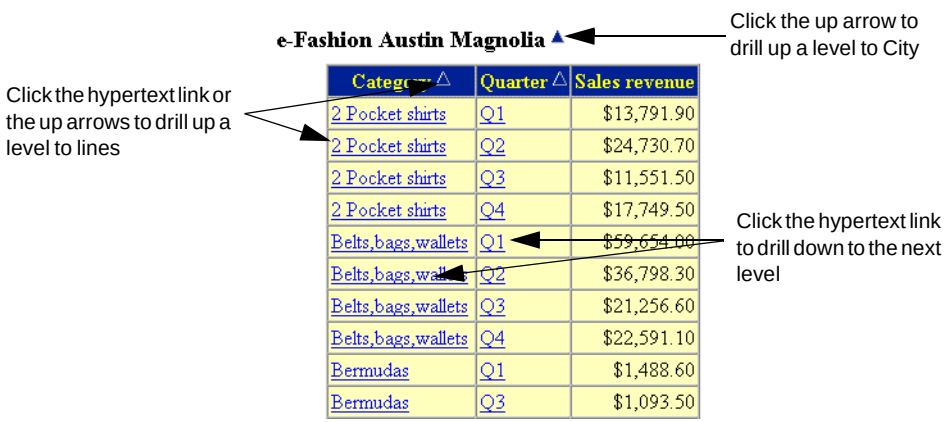
Using tooltips and status bars to locate drillable data

Depending on your browser, a tooltip may tell you when you've positioned the cursor over a drillable area. It will also tell you what level you will drill to. The browser status bar also displays this information.

The tooltip and browser status bar also indicate when drilling will result in a new query.

Drilling up or down in a table

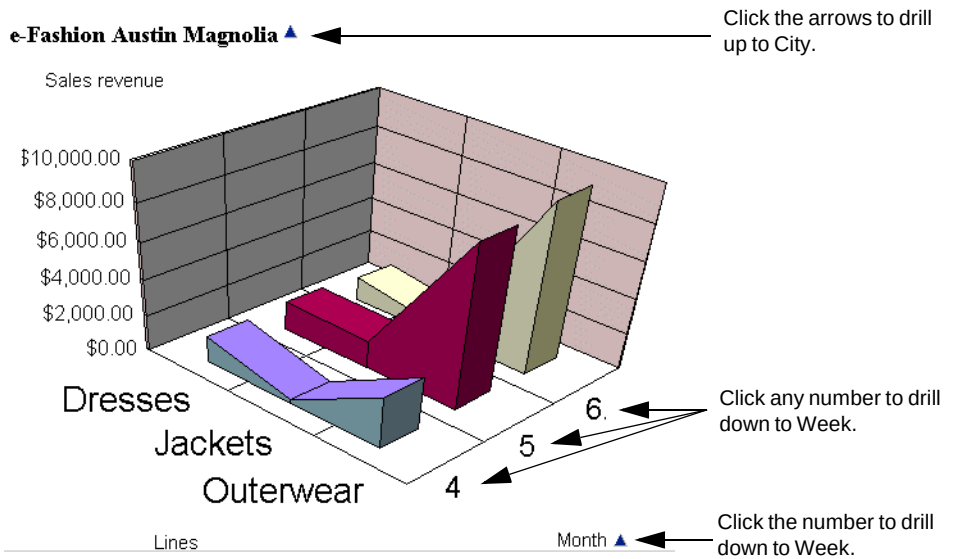
To drill down in a table, click the hyperlink text. To drill up, click the up arrow.



Drilling up or down in a chart

To drill down a level, click on the data – for example, a bar, line, pie wedge, or area, or a title. You can also click on the data representation in the legend. Use the tooltip or browser status bar to help you locate drillable data.

To drill up, click the up arrow. To drill down again, click the object's value in the chart.



Note: You cannot drill through on a dimension object that appears in more than one hierarchy.

Chapter 8 Troubleshooting

In this chapter

General Advice

In order to log into WEBINTELLIGENCE, your browser needs to be cookie-enabled.

If you're using WEBINTELLIGENCE Reporter, your browser must also be both Java and JavaScript enabled. If it isn't, some parts of WEBINTELLIGENCE may not work. You can check this in the options for your browser.

Important: If you have any problems of this nature, run the browser configuration check by clicking its link in the WEBINTELLIGENCE Login page.

Try to empty your browser's memory cache regularly. Having a large part of your disk allocated to the cache can slow down the operation of your computer (especially if you have little free disk space already). For instructions, consult your browser's on-line help.

You should also set your browser to check for newer versions of the stored page every time you visit the page. For instructions, consult your browser's on-line help.

Common Problems

The following is a list of problems you may encounter when using WEBINTELLIGENCE Reporter or Explorer, as well as possible solutions. If these solutions still don't resolve your problem, contact your WEBINTELLIGENCE system administrator for help.

- When you try to log in, an error message appears
- When you click Create Document, you get an error message
- Nothing happens when you select a universe
- An empty Web Panel opens when you select a universe
- You have received the message, "Access to the universe or Editing not allowed"
- You have received the message: "The edited report has been deleted"
- Nothing happens when you run a query
- You have run a query, but receive a timeout before the query can be completed.

- When you run a query you get an incomplete conditions prompt
- You have selected query conditions from a list, and you receive the message: "Too many values selected!"
- You have run a query and you receive the message: "No data found!"
- When you tried to run a query, you received the message: "Incomplete crosstab report"
- Problems occur when you try to load a document's data into a spreadsheet
- When you try to take an action on a document, the error message appears: "The document contains no data"
- You have received the message: "This name already exists, use a different name or allow overwrite"
- You have received the message: "The required service is not available"
- The Send or Publish window is only partially displayed

When you try to log in, an error message appears

You have provided your username and ID in the WEBINTELLIGENCE login page, and you get an error message instead of InfoView.

What you can do

- Your login information may be incorrect. In this case, you should contact your WEBINTELLIGENCE administrator or the BusinessObjects supervisor who created your user profile.
- If you're using Microsoft Internet Explorer 2, you will be unable to login. WebIntelligence requires a cookie containing login information and a session ID in order to connect you to the WEBINTELLIGENCE system. Internet Explorer 2 doesn't recognize cookies. In this case, you must change your browser to a WEBINTELLIGENCE-supported browser.
- Run the Quick Browser check by clicking the link in the WEBINTELLIGENCE login page. It will make sure the browser you're using is supported, and that your browser is cookie-enabled.

When you click Create Document, you get an error message

You want to view the list of universes or create a document, but the **Available Universes** page doesn't appear.

What you can do

- If an error message is flashing on screen or a blank page displays, click the browser's **Refresh** or **Reload** button.
- If you get a browser error message, your Web server may not be running. In this case, contact your WEBINTELLIGENCE system administrator.

Nothing happens when you select a universe

You have selected a universe in the **Available Universes** page in order to create a document, and WEBINTELLIGENCE hasn't opened the Web Panel with the selected universe displayed in the Classes and Objects panel.

The .DLL file versions for the Virtual Machine (VM) on your machine may not be compatible with your Web browser version. This can happen, for example, when a Microsoft Internet Explorer 3.01 or 3.02 update installation doesn't correctly copy the updated .DLLs.

What you can do

Contact your system administrator.

An empty Web Panel opens when you select a universe

You have selected a universe in the **Available Universes** page in order to create a document, but the Web Panel opens without the selected universe's classes and objects displayed.

What you can do

Contact your system administrator.

You have received the message, "Access to the universe or Editing not allowed"

You have tried to edit an existing document, but instead of the universe and document definitions opening in the Web panel, you receive this message.

What you can do

First, try reloading the page in your browser.

If this hasn't fixed the problem, it is possible the BUSINESSOBJECTS supervisor has not accorded you the rights to access the universe on which this document is based. This means you can view the document, but you cannot edit it.

If this presents a problem, talk to the supervisor about modifying your access rights.

You have received the message: "The edited report has been deleted"

An existing document was open in your Results page. During this WebIntelligence session, you were inactive long enough for the Session Manager to automatically log you out. You logged back in again, and clicked the Edit button to edit the document definition. But when WebIntelligence opened the Web Panel, instead of displaying the universe and document definitions, it flashed this message.

What you can do

This document definition has been cleared from the WEBINTELLIGENCE system's temporary storage cache for this session. Simply log out of WEBINTELLIGENCE, log in again, then open the document definition in the Web Panel immediately.

Nothing happens when you run a query

You have completed editing your query and clicked the Get Results button in the Web Panel. The document containing the query results, however, fails to appear.

What you can do

Click your browser's Refresh or Reload button.

If this doesn't work, log out of WEBINTELLIGENCE, log back in again, then run the query again.

You have run a query, but receive a Timeout before the query can be completed

This sometimes happens if you are using a Microsoft Internet Explorer 5.5 or 6.0 browser. Normally, the timeout should occur after 5 or 10 minutes.

What you can do

You need to change the timeout parameter modifying the registry for Internet Explorer. To do this:

1. Install Internet Explorer 5.5 or 6.0 (you can obtain these versions from the Microsoft Web site).
2. Add the ReceiveTimeout DWORD value with a data value of <number of seconds>*1000 in the following registry key:
   `HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\InternetSettings`

   For example, if you want the timout duration to be 8 minutes, set the ReceiveTimeout data value to 480000 (<480>*1000).

When you run a query you get an incomplete conditions prompt

Before actually submitting a query, the Web Panel checks for any conditions that may be in the document. If a condition is incomplete, the Web Panel pops up a dialog box informing you that at least one condition is incomplete.

What you can do

There are two main reasons you may have incomplete conditions:

- Unspecified operation
- Unspecified parameters

When you add a condition to a document, you *must* specify a condition operation. You can tell whether a condition is complete or not by how the condition operation section of the condition object appears. If you haven't selected an operation, the condition operation section is gray and raised, the same way that the drop-down list appears when you choose the condition operation. If you have selected an operation, the operation section blends into the condition object, with the same color and no raised appearance.

With parameters, check if there are valid values in the input box or boxes of the condition object. If the box contains no values or a double quote mark, fill in the box with an appropriate value.

You have selected query conditions from a list, and you receive the message: "Too many values selected!"

You have selected more than 200 condition operand values to be applied to an object in a document definition.

What you can do

Reduce the number of values to 200 or fewer, then run the query again.

You have run a query and you receive the message: "No data found!"

WEBINTELLIGENCE found no data in the database that matched the query.

What you can do

Make sure any conditions you've applied to objects in the document definition are valid: they must correspond to the terms in the database. For example, you can apply the condition 1996 to the object Revenues to obtain the revenue results for that year, but if that year is referred to as FY96 in the database, WEBINTELLIGENCE will be unable to fetch this information. You can resolve this problem easily by choosing the condition from a list if a list is available.

If the problem isn't an invalid condition, rebuild your document definition using objects that better correspond to the data in the database.

When you tried to run a query, you received the message: "Incomplete crosstab report"

You have finished editing a document definition in the Web Panel. When you tried to run the query by clicking the Get Results button, however, this message flashes across the screen.

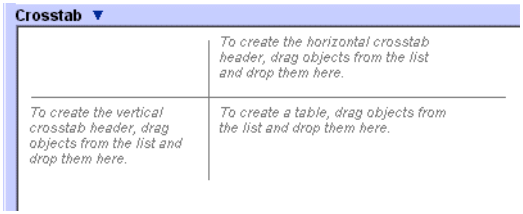
What you can do

You have created a crosstab document definition, but you haven't provided all the elements it needs.

A crosstab document contains the following parts:

- A horizontal crosstab header
- A vertical crosstab header
- The table's body, which contains the query results

If you have selected Crosstab from the Block Type menu, or started placing objects in the Web Panel's Block panel in a crosstab format, the Block panel clearly displays each of these elements.



Make sure each crosstab section contains at least one universe object, then run the query again.

Problems occur when you try to load a document's data into a spreadsheet

What you can do

When you load data from a document into a spreadsheet, you may need to define the spreadsheet application you want to use.

Data imported into a spreadsheet is imported as text. This means that your computer's number settings affect the way the text is handled.

If the text from the WEBINTELLIGENCE document uses a decimal point as the decimal separator, your computer must do the same, otherwise the numbers will not be recognized. You will not be able to format them or make calculations. Typically, this occurs if your regional settings are for Continental European countries such as France and Germany, and you are using a decimal symbol used in a North American country (USA or Canada) or vise versa.

If you're using Windows, you can change the decimal separator in the Windows Control Panel's **Regional Settings** dialog box.

When you try to take an action on a document, the error message appears: "The document contains no data"

You have tried to edit a document containing query results, or load its data into a spreadsheet or save it. The action does not take place, and an inappropriate error message appears indicating that the document contains no data.

What you can do

- The BUSINESSOBJECTS supervisor may have changed your access rights during the current session so that you no longer have access to the current document domain. In this case, contact the supervisor.
- The HTML page may simply need reloading. Click your browser's **Refresh** or **Reload** button.
- You may need to log out of WEBINTELLIGENCE, then log back in again.

You have received the message: "This name already exists, use a different name or allow overwrite"

You have just tried to save a document to your personal storage area and a document with that name already exists.

What you can do

This message is simply prompting you do one of the following:

- Select Yes for the Overwrite if document exists option if you want to overwrite the existing document of that name, then click **Save** again.
- If you don't want this document to overwrite the existing one, change this document's name, then click **Save** again.

You have received the message: "The required service is not available"

You have taken any kind of action in WEBINTELLIGENCE, such as opening a document access page, or simply clicking a button in the toolbar or navigation bar, and you receive this message.

What you can do

Simply click the **Refresh** or **Reload** button in your browser.

The Send or Publish window is only partially displayed

You have tried to send a document to another user or publish it to the corporate repository, but the **Send** or **Publish** page isn't completely displayed.

What you can do

Simply click the **Refresh** or **Reload** button in your browser.

Appendix A
Universal Access Java Applet Keyboard Options

In this appendix

Overview

This appendix explains the keyboard access shortcuts, using the tab key or a combination of keys, to navigate through WEBINTELLIGENCE. These shortcuts, available with the Universal Access Java applet, offer an alternative to using a mouse.

General Information

- It is not necessary to activate the Universal Access Java applet to view and refresh reports.
- INFOVIEW and WEBINTELLIGENCE have:
  - keyboard replacement of mouse actions
  - screen reader accessibility
  - high contrast colors
  - alternative descriptions for images
- Windows client and Internet Explorer Browser accessibility is fully supported.
- JDK 1.3 must be installed to use the Universal Access Java applet.
- Charts are not available to screen readers. This includes bar, line, surface, area, pie, volume, doughnut, polar, and simple scatter charts.

Note: For instructions on activating the Universal Access Java applet, refer to Appendix A in the *InfoView User's Guide*.

- Creating a document with the Universal Access Java applet is similar to creating a document with the Light Java applet.

  Refer to Chapter 1, Creating Documents with WebIntelligence, in the *WebIntelligence User's Guide* for further information on creating documents using WEBINTELLIGENCE. For the keyboard options for the Results panel, go to page 240.

Keyboard Options

Tab Key

To navigate in WEBINTELLIGENCE you will most often use the Tab key. The tab order in the WEBINTELLIGENCE panels was chosen in accordance with Java standards, which state that the tab order should start at the top left-most control. The tab order in most cases goes from left to right, top to bottom. When using the Java applet, the tab order will be what is most logical for the user.

For example, the Results tab, the default page, has the following tab order:

- the Classes and Objects panel
- the report definition (Section, Block, and Custom Scope of Analysis)
- the Web Panel toolbar options
- the other available panels (Conditions and Settings)
- the lower buttons (Save and Close, Apply Format, and Run Query)

Applet Frame Keyboard Options

To get from one frame to another:

Press	To
CTRL+ TAB	Tab between the applet frames, the top and navigation bars, and the URL address bar.
TAB	Move between applet frames or select the first feature in a frame, which in the Results tab is the All Objects list box.

Keyboard Options for Changing Tab Panels

Results tab

The following keyboard options are available with the Results tab:

Press	To
TAB	Advance to the Conditions tab.
SHIFT+TAB	Return to the previous tab stop.
SPACE, ENTER	Open the Results tab.

Conditions tab

The following keyboard options are available with the Conditions tab:

Press	To
TAB	Advance to the Settings tab.
SHIFT+TAB	Return to the Results tab.
SPACE, ENTER	Open the Conditions tab.

Settings tab

The following keyboard options are available with the Settings tab:

Press	To
TAB	Advance to Save and Close.
SHIFT+TAB	Return to the Conditions tab.
SPACE, ENTER	Open the Settings tab.

Save and Run Query Keyboard Options

Save and Close button

The following keyboard options are available with Save and Close:

Press	To
TAB	Advance to Apply Format, if available, otherwise you advance to Run Query.
SHIFT+TAB	Return to the Settings tab.
SPACE, ENTER	Save and close the applet.

Apply Format button

The following keyboard options are available with Apply Format:

Press	To
TAB	Advance to Run Query.
SHIFT+TAB	Return to Save and Close.
SPACE, ENTER	Apply any format changes to the report.

Run Query button

The following keyboard options are available with Run Query:

Press	To
TAB	Return to the beginning of the tab order. In the Report tab, for example, this would be the All Objects list box.
SHIFT+TAB	Return to the Apply Format button, if available, otherwise you return to Save and Close.
SPACE, ENTER	Run the query.

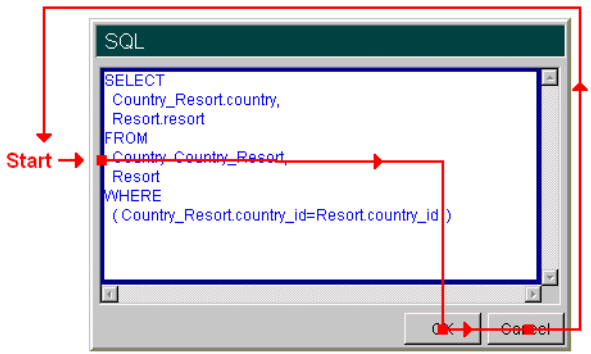
The Web Panel Toolbar

Show SQL Icon

The Show SQL icon is available in the Results tab. The following keyboard options are available:

Press	To
TAB	Advance to the Help icon.
SHIFT+TAB	Return to the Custom Scope of Analysis zone. If it is not open, then you return to the block zone.
SPACE,ENTER	Open the SQL window. The OK button is highlighted by default.

SQL window



The tab order is:

- the text entry area
- the OK button
- the Cancel button

The following keyboard options are available for the SQL window:

Press	To
TAB, SHIFT+TAB	Place the cursor in front of the word SELECT in the text entry area. See the next table for the text entry area keyboard options.
SPACE, ENTER	Close the window.

The following keyboard options are available for the text entry area:

Press	To
TAB, SHIFT+TAB	Continue to the OK button.
UP, DOWN, LEFT, RIGHT ARROWS	Moves cursor placement.
SHIFT+ UP, DOWN, LEFT, RIGHT ARROWS	Select while moving cursor.
CTRL+A	Select All.
CTRL+C	Copy.
CTRL+X	Cut.
CTRL+V	Paste.
CTRL+Z	Undo.
DELETE	Delete.

Help Icon

This icon is available in the Results and Conditions tab . The following keyboard options are available:

Press	To
TAB	Advance to the Scope of Analysis icon.
SHIFT+TAB	Return to the Show SQL icon.
SPACE, ENTER	Open/close Help.

Scope of Analysis Icon

This icon is only available in the Results tab. The following keyboard options are available:

Press	To
TAB	Advance to the Section icon.
SHIFT+TAB	Return to the Help icon.
SPACE, ENTER	Open/close the Custom Scope of Analysis zone.

Section and Block/Query Conditions Icon

In the Results tab, this button is called the Section and Block icon and the following keyboard options are available:

Press	To
TAB	Advance to the Block Type icon.
SHIFT+TAB	Return to the Scope of Analysis icon.
SPACE, ENTER	Toggle between the Section and Block and Section only work areas.

In the Conditions tab, this button is called the Query Conditions icon and the following options are available:

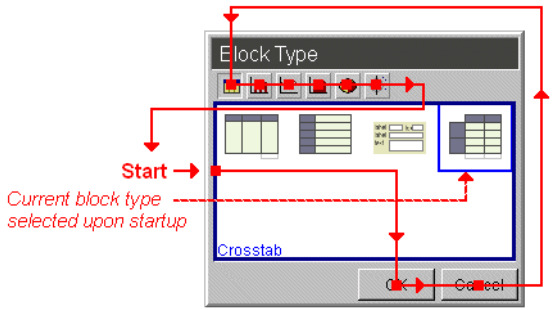
Press	To
TAB	Advance to the Help icon.
SHIFT+TAB	Return to the Document filters zone.
SPACE, ENTER	Open/Close the Query Conditions panel.

Block Type Icon

This icon is only available in the Results tab. The following keyboard options are available:

From	To
TAB	Advance to the Add Ascending Sort icon.
SHIFT+TAB	Return to the Section and Block icon.
SPACE, ENTER	Open the Block Type popup window.

Block Type window



The tab order is as follows:

- the block formats available for a block type, with the default on the block type currently being used
- the OK button
- the Cancel buttons
- the block type buttons

Note: When you navigate within the block type formats, screen readers may not read the names.

The following keyboard options are available for the Block Type window:

Press	To
TAB	Advance to the next block, block type, or button according to the tab order.
SHIFT+TAB	Return to the previous block, block type, or button according to the tab order.
SPACE, ENTER	• If on block, select block. • If on block type, select block type. The available blocks are displayed below the block buttons. • If on OK, save your selection and return to the Results tab. • If on Cancel, cancel window and return to the Results tab.

Add Ascending Sort Icon

This icon is only available in the Results tab. The following keyboard options are available:

Press	To
TAB	Advance to the Add Descending Sort icon.
SHIFT+TAB	Return to the Block Type icon.
SPACE, ENTER	Apply an ascending sort on the selected object.

Add Descending Sort Icon

This icon is only available in the Results tab. The following keyboard options are available:

Press	To
TAB	Advance to the Add Break icon.
SHIFT+TAB	Return to the Add Ascending Sort icon.
SPACE, ENTER	Apply an descending sort on the selected object.

Add Break Sort Icon

This icon is only available in the Results tab. The following keyboard options are available:

Press	To
TAB	Advance to the Add Calculation icon.
SHIFT+TAB	Return to the Add Descending Sort icon.
SPACE, ENTER	Apply a break to the selected object.

 Add Calculation Icon

This icon is only available in the Results tab. The following keyboard options are available:

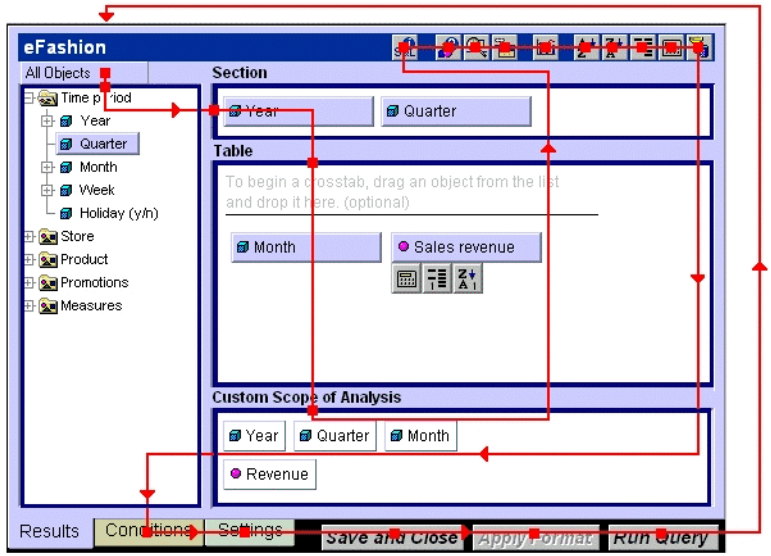
Press	To
TAB	Advance to the Add Filter icon.
SHIFT+TAB	Return to the Add Break icon.
SPACE, ENTER	Apply a calculation to the selected object.

 Add Filter Icon

This icon is only available in the Results tab. The following keyboard options are available:

Press	To
TAB	Advance to the Conditions tab.
SHIFT+TAB	Return to the Add Calculation icon.
SPACE, ENTER	Open the Conditions tab with selected object as the beginning of the filter, and the cursor on the operator type list box.

The Results Tab

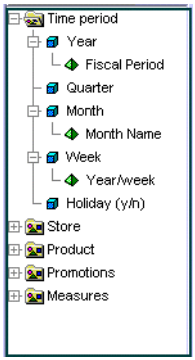


When you open the Java applet, the Results Tab appears by default. The tab order is as follows:

- the Classes and Objects panel
- the report definition (Section, Block, and Custom Scope of Analysis)
- the option icons
- other available tabs (Conditions and Settings)
- the lower buttons (Save and Close, Apply Format, and Run Query)

Classes and Objects Panel Keyboard Options

The Classes and Objects panel contains the objects and measures used to create a report.



The following keyboard options are available:

Press	To
TAB	Navigate to the Classes and Objects panel title when first opening the Java applet.
SHIFT+TAB	Navigate to the previous tab order selection.
UP ARROW, DOWN ARROW	If "All Objects" is selected, the tab order goes to "Hierarchies". If "Hierarchies" is selected, the tab order goes to "All Objects".
SPACE, ENTER	Accept the selection.

Once inside the Classes and Objects panel, you can use the following keyboard options:

Press	To
TAB	Advance to the Section panel.
SHIFT+TAB	Move backwards to the Classes and Objects panel title.
-, LEFT ARROW	Close the folder, sub-menu, or dimension if contains a detail.
+, RIGHT ARROW	Open a closed folder, sub menu, or dimension if contains a detail.
UP ARROW	Move up to the previous object.
DOWN ARROW	Move down to the next object.
ENTER	Add highlighted object or class to the Block panel.
CTRL+ ENTER	Add highlighted object or class to the Section panel.
CTRL+ SHIFT + ENTER	Add highlighted object or class to the Custom Scope of Analysis.

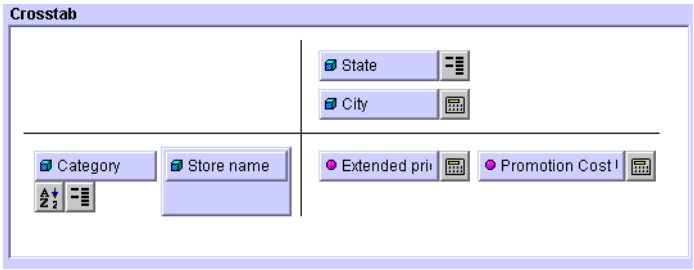
Report Definition Keyboard Options

Section Panel

Keyboard Options

Press	To
TAB	Advance to the Block panel.
SHIFT+TAB	Return to the Classes and Objects panel.
LEFT ARROW	Move to the left object. If there is no object to the left, nothing happens.
RIGHT ARROW	Move to the right object. If there is no object to the right, nothing happens.
DOWN ARROW	Move to an object's sort property. If there is no sort on the object, nothing happens.
UP ARROW	Move to object, if it contains a sort property. If there is no sort on the object, nothing happens.
SPACE, ENTER	Enter the Section panel and select the first object. • If there is no object then nothing happens. • If the object is highlighted, this shortcut selects the object. • If the sort is highlighted, this shortcut reverses the sort.
CTRL+ LEFT ARROW	Move selected object to the left of the previous object. If there is no object to the left, nothing happens.
CTRL+ RIGHT ARROW	Move selected object to the right of the following object. If there is no object to the right, nothing happens.
DELETE	Remove selected object from the Section panel.

Block Panel



Keyboard Options

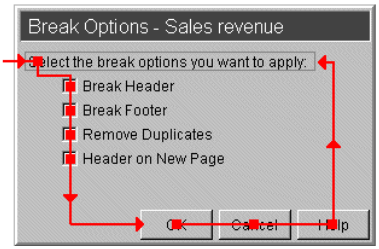
Press	To
TAB	Advance to the Custom Scope of Analysis panel if open, otherwise to the Show SQL icon.
SHIFT+TAB	Return back to Section panel.
LEFT ARROW	Move to the previous object, if there is no object to the left then you will go to the last object in the previous line. If there are no other objects, then nothing happens.
RIGHT ARROW	Move to the following object, if there is no object to the right then you will go to next line. If there are no other objects, then nothing happens.
DOWN ARROW	Move to an object's property (sort, calculation, or break). If there are no properties, then nothing happens.
UP ARROW	Move to an object from its property (sort, calculation, or break). If there are no properties, then nothing happens.

Press	To
SPACE, ENTER	Enter the block zone to the first object. • The object is selected. • If a sort is selected, it is reversed. • If a break is selected, the Break Options properties window appears. See the section "Break Options" on page 246. • If a calculation is selected, the Calculations properties window appears. See the section "Calculations" on page 246. • If there are no objects nothing happens.
CTRL + LEFT ARROW	Move the selected object to the left. • If there is an object directly to the left, objects are swapped. • If a sort, calculation, or break is highlighted, nothing happens. • If there are no objects already to the left, nothing happens.
CTRL + RIGHT ARROW	Move the selected object to the right. • If there is an object directly to the right, objects are swapped. • If a sort, calculation, or break is highlighted, nothing happens. • If there are no objects already to the right, nothing happens.
CTRL + UP ARROW	Move the selected object up. • If there is an object directly above, and user is in the top section of a crosstab, objects are swapped. • If a sort, calculation, or break is highlighted, nothing happens.
CTRL + DOWN ARROW	Move selected object down. • If there is an object directly underneath, and user is in the top section of a crosstab, objects are swapped. • If a sort, calculation, or break is highlighted, nothing happens.
DELETE	Remove a selected object from the Section panel.

Object Properties Panels

Break Options

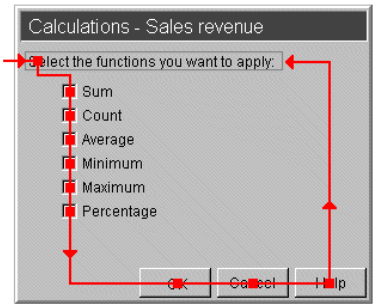
In the block zone an object can have a break applied.



The tab order is:

- Break Header check box
- Break Footer check box
- Remove Duplicates check box
- Header on New Page check box
- the OK, Cancel, and Help buttons

Calculations



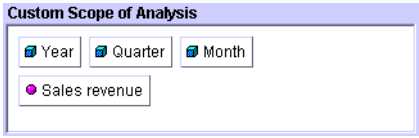
The tab order is:

- Sum check box
- Count check box
- Average check box
- Minimum check box
- Maximum check box
- Percentage check box
- the OK, Cancel, and Help buttons

Keyboard Options

Press	To
TAB	Advance to the next function in the properties window.
SHIFT+TAB	Return to the previous function in the properties window.
SPACE, ENTER	Activate button or Check/uncheck highlighted check box.

Custom Scope of Analysis Zone



Keyboard Options

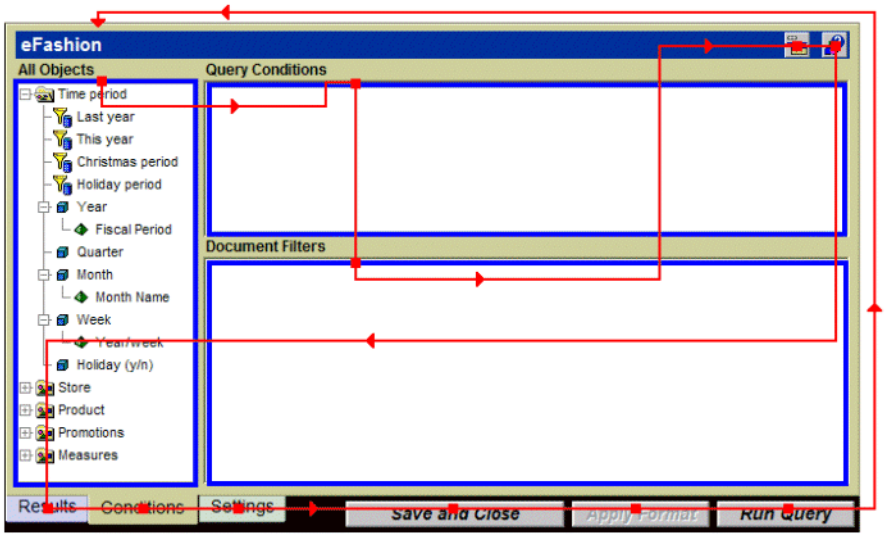
Press	To
TAB	Advance to Show SQL icon.
SHIFT+TAB	Return to block zone.
LEFT ARROW	Move to a user-added object to the left. • If there are no more user-added objects then you move back to the last object. • If there are no user-added objects, then nothing happens. • If there is no user-added object to the left then you move to previous line.
RIGHT ARROW	Move to a user-added object to the right. • If there are no more user-added objects then you move back to the last object. • If there are no user-added objects, then nothing happens. • If there is no user-added object to the right then you move to previous line.

Shortcut Keys

You can use the following shortcut keys in the Results tab:

Press	To go to
CTRL + SHIFT + L	All Objects list box or Hierarchies list box (depending on what is chosen)
CTRL + SHIFT + O	Object outline panel
CTRL + SHIFT + S	Section panel
CTRL + SHIFT + K	Block zone The first object in the zone is highlighted.
CTRL + SHIFT + N	Scope of Analysis zone
CTRL + SHIFT + T	The toolbar, starting on the Show SQL icon
CTRL + SHIFT + Q	Show SQL Icon
CTRL + SHIFT + H	Help icon
CTRL + SHIFT + V	Scope of Analysis icon
CTRL + SHIFT + Z	Section and Block icon
CTRL + SHIFT + Y	Block Type icon
CTRL + SHIFT + A	Add Ascending sort icon
CTRL + SHIFT + D	Add Descending sort icon
CTRL + SHIFT + B	Add Break sort icon
CTRL + SHIFT + M	Add Calculation Icon
CTRL + SHIFT + F	Add Filter icon
CTRL + SHIFT + C	Conditions tab
CTRL + SHIFT + I	Setting tab
CTRL + SHIFT + E	Save and Close
CTRL + SHIFT + P	Apply Format
CTRL + SHIFT + R	Run Query

The Conditions Tab

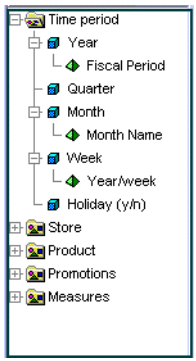


The tab order of the Conditions panel is:

- the Classes and Objects panel
- the Conditions zone
- the Document Filters panel
- the toolbar icons. The Query Conditions and Help icons are available for this panel. For a description of the keyboard options for the Query Conditions icon, go to “Section and Block/Query Conditions Icon” on page 235. For a description of the keyboard options for the Help icon, go to “Help Icon” on page 235.
- the Document Filters panel
- the Classes and Objects panel
- the other available tabs (Results and Settings)
- Save and Close
- Apply Format, if available
- Run Query

Classes and Objects Panel Keyboard Options

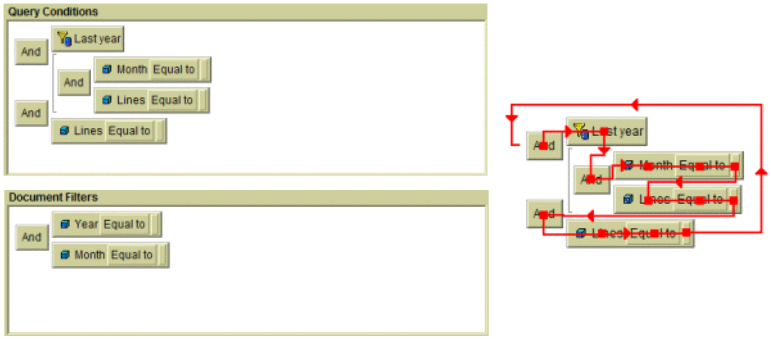
Once inside the Classes and Objects panel, you can use the following keyboard options:



Press	To
TAB	Advance to the Section panel.
SHIFT+TAB	Move backwards to the Classes and Objects panel title.
-, LEFT ARROW	Close the folder, sub-menu, or dimension, if it contains a detail.
+, RIGHT ARROW	Open a closed folder, sub menu, or dimension if it contains a detail.
UP ARROW	Move up to the previous object.
DOWN ARROW	Move down to the next object.
ENTER	Add highlighted object or class to the Block panel.
CTRL+ ENTER	Add highlighted object or class to the Section panel.
CTRL+ SHIFT + ENTER	Add highlighted object or class to the Custom Scope of Analysis panel.

The Query Conditions and Document Filters Zones

The tab order in these zones begins with the first query condition. Within the query object, the tab order is from left to right, top to bottom.



The following keyboard options are available:

Press	To
TAB	Advance to the Document Filters zone.
SHIFT+TAB	Return to the Classes and Objects panel.
LEFT ARROW	Return to the previous condition.
RIGHT ARROW	Advance to the next condition.

To use the And and Or logical operators, you can use these keyboard options:

Press	To
CTRL + RIGHT ARROW	Move a filter or condition object to the right, making it an operator AND or OR.
CTRL + LEFT ARROW	Remove the indent of the filter object.
ENTER, or SPACE	Change AND to OR, and OR to AND.

When you press ENTER on an operator, the operator box opens. Then you can use these keyboard options:

Press	To
DOWN ARROW	Change operator to the next one on the list.
UP ARROW	Change operator to the previous one on the list.
ENTER	Select the operand list box.

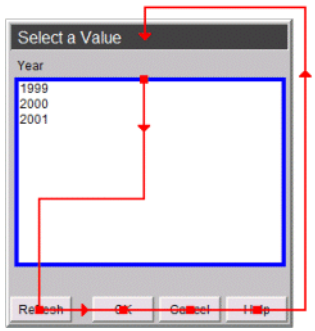
The following keyboard options are available in the operand list box:

Press	To
DOWN ARROW	Change the operand to the next one on the list.
UP ARROW	Change the operand to the previous one on the list.

With a Constant, Prompt List of Values, or Enter a prompt, you can type any valid text.

Selecting a Value

Select Show List of Values. The Select a Value window opens.



The tab order is:

- the List of Values
- Refresh
- OK
- Cancel
- Help

The following keyboard options are available:

Press	To
TAB	Advance to the next tab stop.
TAB + SHIFT	Return to previous tab stop.
ENTER or SPACE	Go to the values area. The next table on this page indicates the keyboard shortcuts.
Refresh	Refresh the list of values.
OK	Validate the selection and close the window.
Cancel	Close the window with no selection.
On Help	Open the Help window.

Values area

The following keyboard shortcuts are available in the values area:

Press	To
ENTER	Select value.
DOWN ARROW	Advance to the next value.
UP ARROW	Select the previous value.
SHIFT or CTRL + ARROW UP or DOWN	Allow multi-selection.

Shortcut Keys

You can use the following shortcut keys in the Conditions tab:

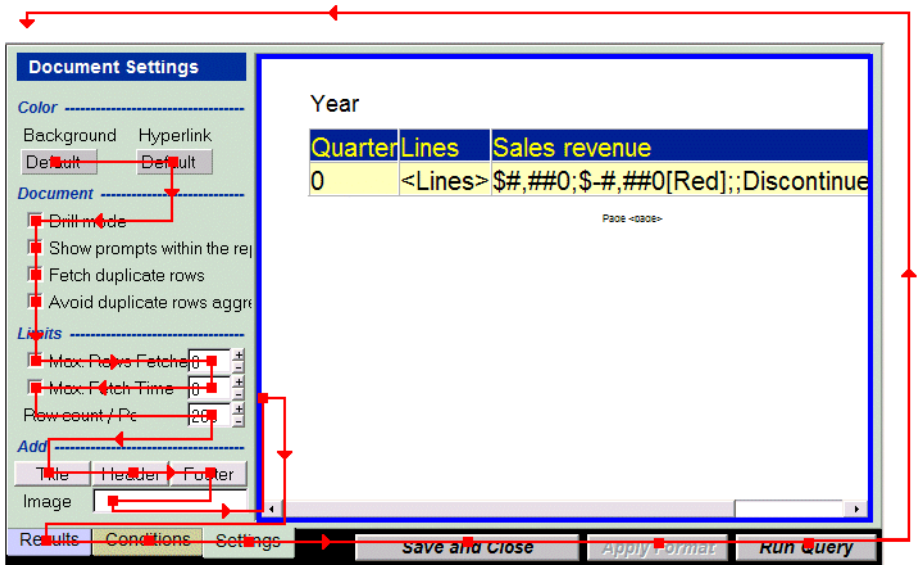
Press	To go to
CTRL + SHIFT + O	The Classes and Objects panel
CTRL + SHIFT + Q	The Query Filters panel
CTRL + SHIFT + D	The Document Filters zone
CTRL + SHIFT + T	The beginning of the toolbar, to the Query Conditions icon
CTRL + SHIFT + H	The Help icon
CTRL + SHIFT + R	The Results tab
CTRL + SHIFT + I	The Setting tab
CTRL + SHIFT + E	Save and Close
CTRL + SHIFT + P	Apply Format
CTRL + SHIFT + R	Run Query

The Settings Tab

The tab order for the Settings tab follows the basic rules as with the Results or Conditions tabs, however the tab key in this panel lets the user navigate through the settings. The rules are the following:

1. The tab order goes from left to right, top to bottom within the left pane, then goes to the report structure pane on the right.

2. If you press the ENTER or SPACE key, it does the following:
   - If you are in a setting list box, it is activated and you can navigate the list using the UP or DOWN ARROW.
   - If you are on a + (plus) control, adds one to the value. If you are on a - (minus) control, subtracts one from the value.
   - If you are on a radio button or check box, it is activated or deactivated.
   - If you are in a textbox, you can type a value.



When you tab past the last setting, you continue to the Report Structure panel. Here you can press enter to be able to navigate through the report elements with the right or left arrows. The tab order is left to right, top to bottom.

Shortcut Keys

You can use the following shortcut keys in the Settings tab:

Press	To go to
CTRL + SHIFT + S	The first setting in the left panel
CTRL + SHIFT + D	The Report Structure panel
CTRL + SHIFT + C	The Conditions tab
CTRL + SHIFT + I	The Settings tab
CTRL + SHIFT + E	Save and Close
CTRL + SHIFT + P	Apply Format
CTRL + SHIFT + R	Run Query

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